EXACT RECEPTION GUIDE

Scotland

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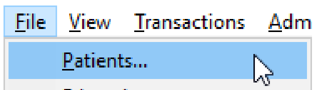
PATIENT INFORMATION

Adding Patients

From the Patients Window

1. Go to File > Patients



2. Click on the +1 on the toolbar
3. Enter all of the relevant information for the patient and select OK
4. The patient will now show in your list.

From the Clipboard

1. From the appointment book double click on the at the bottom left hand side of the appointment book columns.
2. Click on the +1 on the toolbar
3. Enter all of the relevant information for the patient and select OK
4. The patient will now show in your list.

Printing Patient Details

You can view a video guide using the link below:

https://www.youtube.com/watch?v=-BmMKIoQiUs

Popup Notes

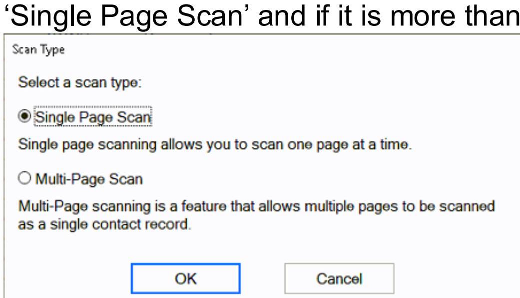
You can view a video guide using the link below:

https://www.youtube.com/watch?v=EPPNISwmh3s

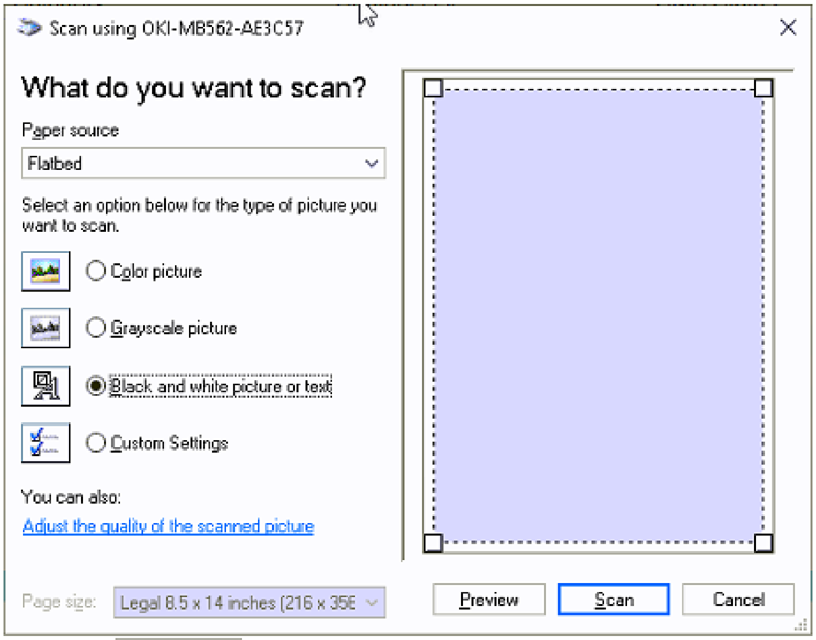
Scanning Patient Documents

Please use the steps below to scan any paper document into the patients file:

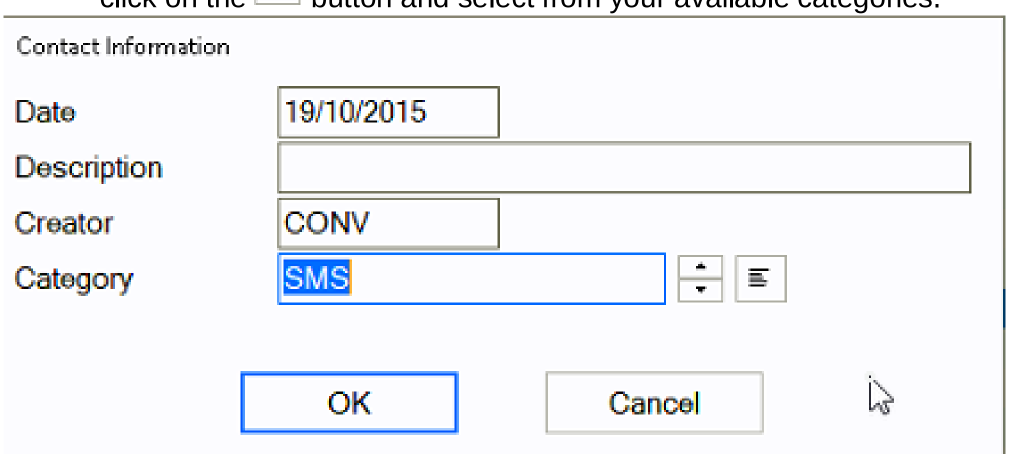
1. Click on the 'Contacts' tab of a patients file
2. Click on Scan in the bottom right hand corner
3. From the screen below select the scan type – if your document is only one page select 'Single Page Scan' and if it is more than 1 select 'Multi-Page Scan'



4. From the screen below select the paper source from the drop down (this is whether you will be using your flatbed or feeder) and choose the picture type – I would advise to use Black and White as this will be a smaller file.



5. Click on Scan
6. You will see the screen below:
   I. The **date** will automatically generate to the date you are scanning the item in. If you need to backdate this you can.
   II. You will need to enter a description so that people can easily identify the document is.
   III. The **creator** will automatically be set as the person who is logged in when the scanning is taking place.
   IV. The category will automatically set as the first in your list. To change the category click on the button and select from your available categories.



APPOINTMENT BOOK

How to Print the Day List

You can view a video guide using the link below:

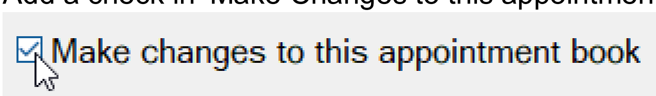
https://www.youtube.com/watch?v=aDc35cbizCg

Configuring the Appointment Book

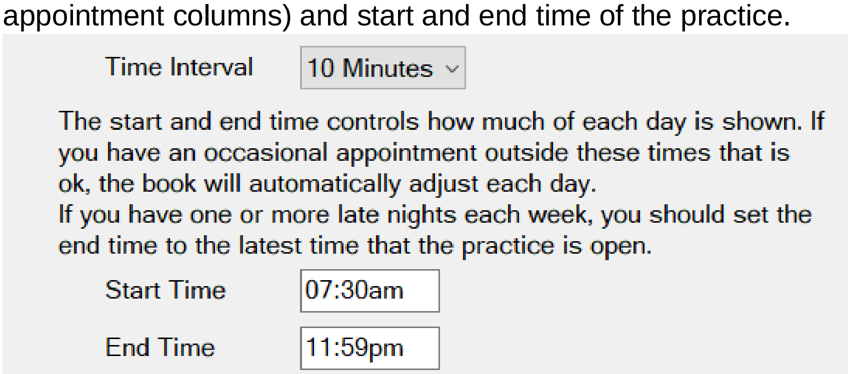
Amending the opening hours and Time Interval

1. On the main appointment book screen, in the bottom right hand corner there is a little black spanner icon, this is where the appointment book tabs can be configured.

2. Add a check in 'Make Changes to this appointment book



3. Select Next >
4. On this screen below you can adjust the time interval (increments on the sides of the appointment columns) and start and end time of the practice.

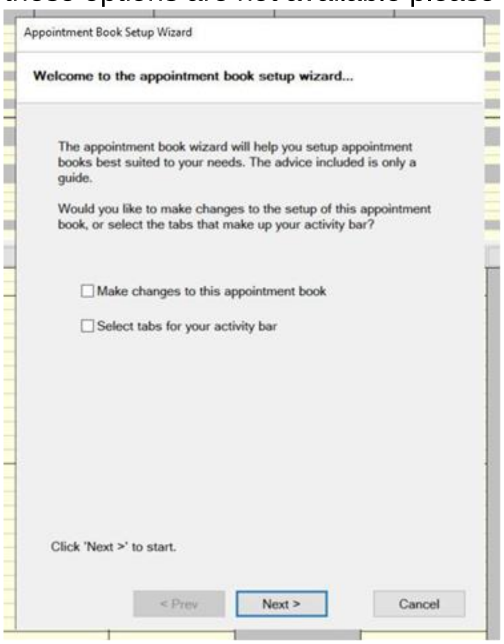


5. Once you have made the changes select Next >, Next > and Finish

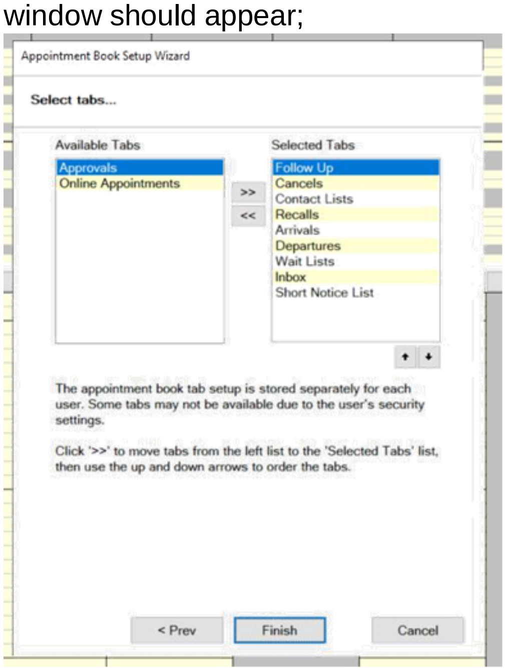
Adding and Removing Tabs

6. On the main appointment book screen, in the bottom right hand corner there is a little black spanner icon, this is where the appointment book tabs can be configured.

7. When you have pushed this the next window should appear with following options; (If these options are not available please login as an administrator)



8. Click on the option “select tabs for your activity bar” and press next twice and the next window should appear;

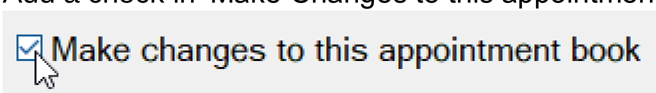


9. All of the available tabs should appear on this screen, the ones currently in use will appear in the right hand box. You can move the order they appear in but highlighting them and using the up and down arrows.
10. To add or remove a tab, highlight the option and then use the chevrons in the middle of the boxes, anything appearing in the left hand box will not show on your appointment book.
11. When happy with the layout, press finish. You may have to close out the appointment book and reopen for changes to appear.

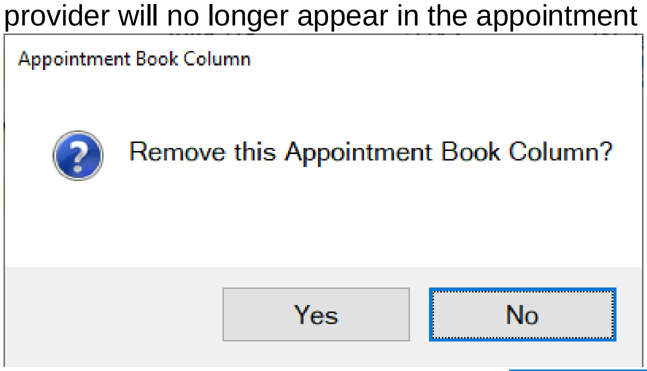
Adding and Removing Columns

1. On the main appointment book screen, in the bottom right hand corner there is a little black spanner icon, this is where the appointment book tabs can be configured.

2. Add a check in 'Make Changes to this appointment book'



3. Select [Next >], [Next >] and [Next >] again
4. You will now see the 'Select the required columns.' Screen:
   I. To add a column – click on the providers initials in the 'Available Providers' window and click on the [>>] to move them into the 'Selected Columns' window. Once they appear under selected columns they ill appear in the appointment book to can use the [↑] [↓] buttons to adjust the order of providers in the appointment book.
   II. To remove a column – Click on the provider in the 'Selected Columns' window then click on the button. Select [Yes] on the window below and the provider will no longer appear in the appointment book.



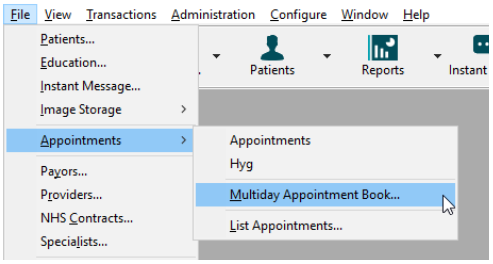
5. Once you are happy with your changes select [Finish].

Multiday Appointment Book

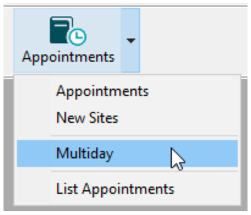
Opening the Multiday Appointment Book

In order to view the multiday appointment book you will need to do one of the following:

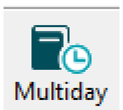
1. Go to File > Appointments > Multiday Appointment Book…



2. Click on the arrow besides appointments and select 'Multiday' from the drop down.

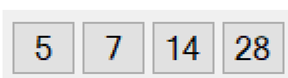


3. Click on the Multiday icon on the workspace

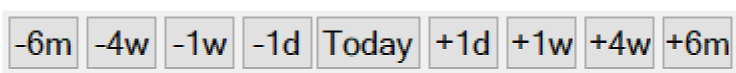


Multiday Options

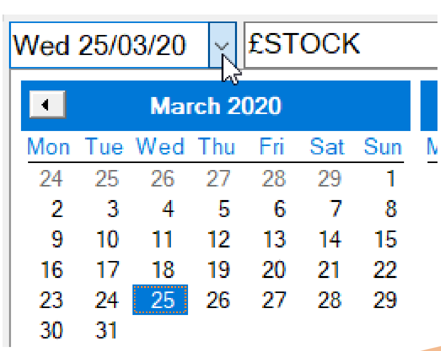
From the multiday appointment book you can view the appointments per provider over the course of five, seven, fourteen or twenty-eight days; you can do this by clicking on the respective numbers in the top right hand side of the screen



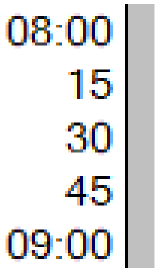
You can use the icons at the top of the daily columns to move between time periods



If you wish to jump to a particular date please use the date field at the top left of the columns.

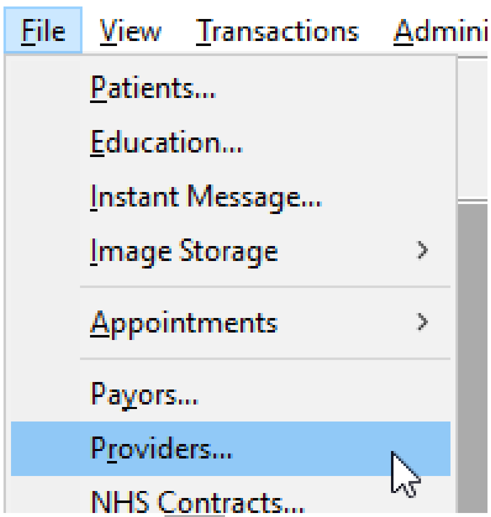


Amending the intervals and opening times

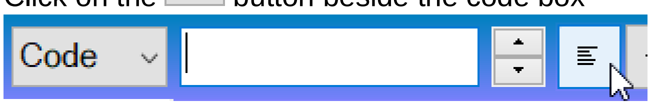


To adjust the time interval on the multiday appointment book as please follow the steps below:

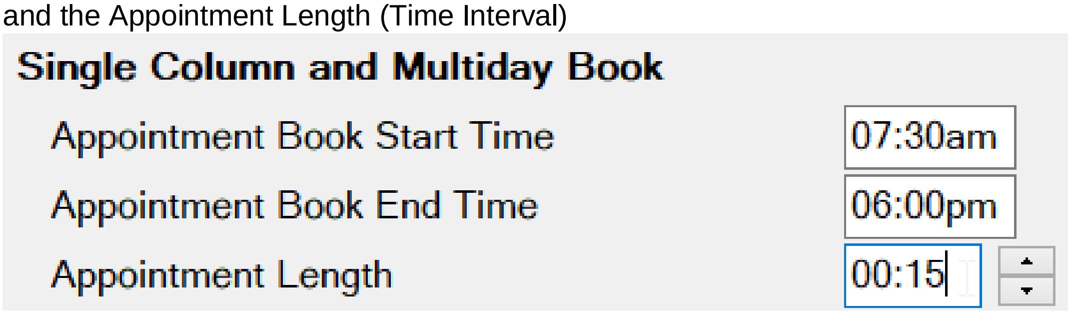
1. Go to File > Providers



2. Click on the button beside the code box



3. Choose the provider you would like to change the time interval for then select OK
4. Click onto the Appointments tab
5. From this screen you can adjust the start and end time of the multiday appointment book and the Appointment Length (Time Interval)

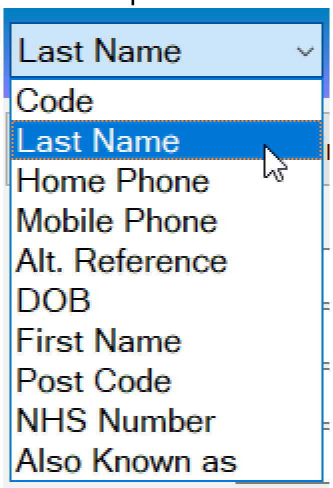


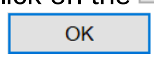
6. Once you have made your changes click on the button on the toolbar.
7. To view the changes you will need to close the Multiday Appointment book and re-open it.

APPOINTMENTS

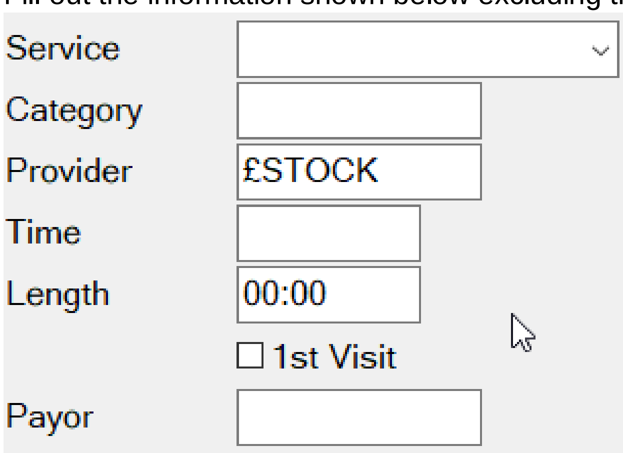
Booking Appointments

1. From the appointment book double click on the  at the bottom left hand side of the appointment book columns.
2. Select from the drop down list which filter you would like to use to find the patient. For this example I have used the last name field.

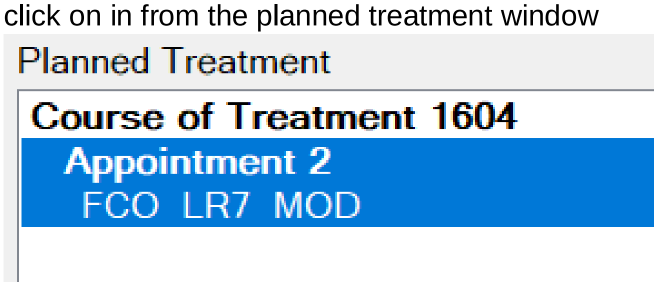


3. Type in the patients last name into the field then click on the  button
4. Choose the correct patient from the list and select 

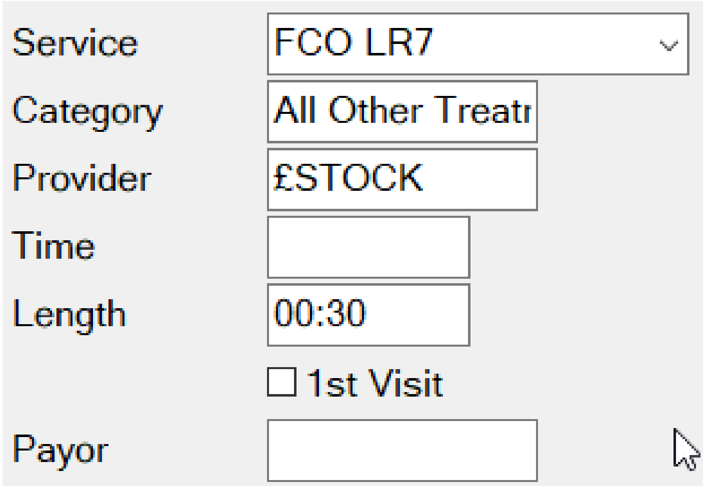
5. Fill out the information shown below excluding the time field.



If you are booking an appointment for treatment that is already planned you can double click on in from the planned treatment window

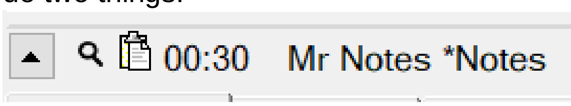


Once you have done this the information from the planned treatment will fill out the fields



6. Select 

7. The appointment will now show on the clipboard on your appointment book and you can do two things:



   I. Use the appointment search tool to find an available appointment space
   II. Drag and drop the appointment into white space in the appointment book.

Adding Family Members and Appointments

You can view a video guide using the link below:

https://www.youtube.com/watch?v=2xec7ihLsaY

Using the Appointment Search Tool

You can view a video guide using the link below:

https://www.youtube.com/watch?v=y2QlTGmWTb8

Printing a Patients Appointment Card

You can view a video guide using the link below:

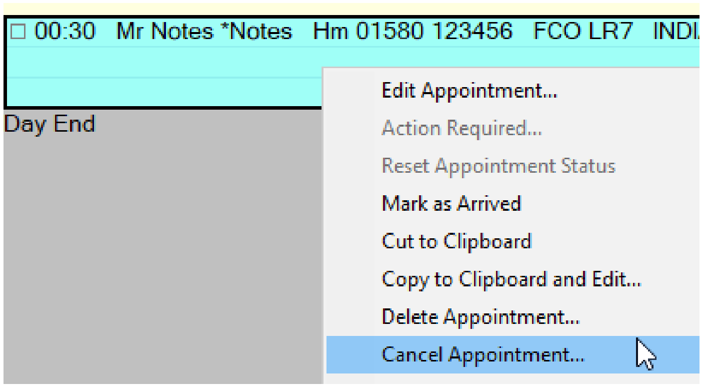
https://www.youtube.com/watch?v=mphl6ubJBOs

Cancelling Appointments

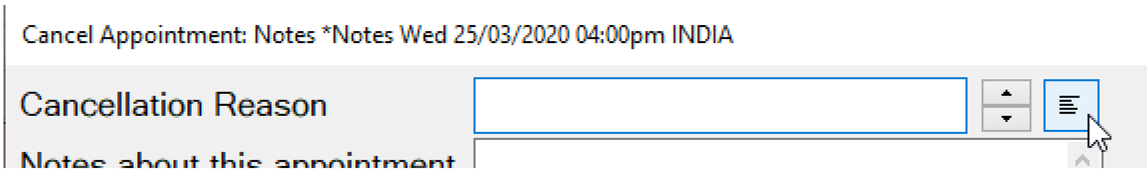
From the Appointment Book

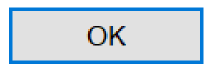
To cancel a patients appointment from the appointment book please follow the steps below:

1. Right click on the appointment and select ‘Cancel Appointment…’

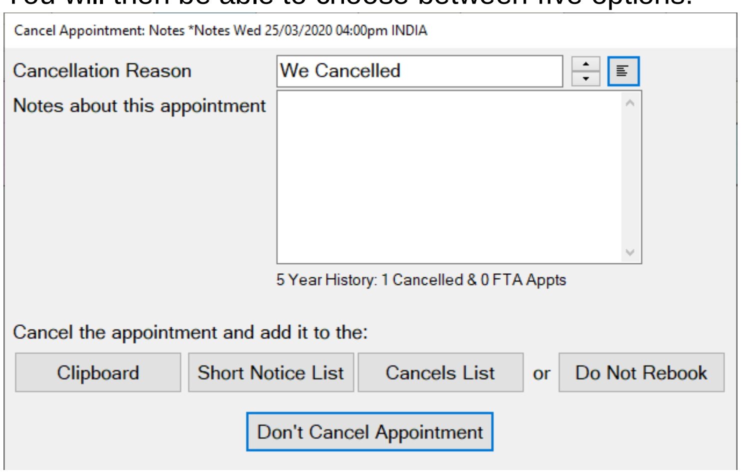


2. Click into the 'Cancellation Reason' field then click on the  button.



3. Select a cancellation reason from the list then select 

4. Enter any notes that you require
5. You will then be able to choose between five options:



I. **Clipboard** – this will put the appointment on the clipboard. This is useful for when an appointment is being rearranged at the point of cancellation.

II. **Short Notice List** – this will place the patients' appointment on the short notice list and allow you to contact them when an appointment space that fits the criteria of their appointment becomes available. This is useful if the patient is unsure when they can rebook or your books are full until a considerable amount of time in the future.

III. **Cancel's List** – this will place the patients' appointment on the cancels list. This can be useful if the patient doesn't know when they want to rebook as when they is space in the diary you can work through these patients to hopefully fill out your appointment book.

IV. **Do Not Rebook** – this will remove the patients' appointment from the diary without prompting you to do anything else. This is useful if the patient will not be coming to the practice again.

V. Do Not Cancel Appointment – this will leave the appointment in the diary.

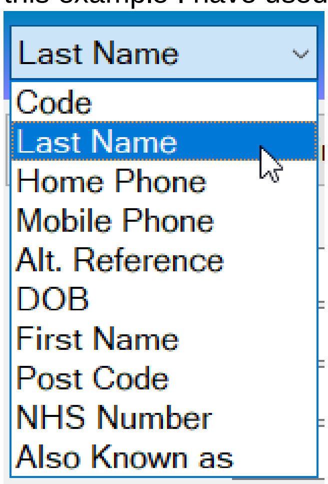
6. Once you cancel the appointment in will no longer show in the appointment book on that date/time but you will see a line on the ‘This patient’s appointments’ which shows the details of the appointment with the cancellation status.

This patient's appointments

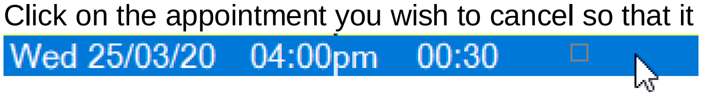
	Date	Time	Length	Status
	Wed 16/01/19	11:00am	00:30	
	Wed 19/02/20	09:15am	00:30	Con...
	Mon 23/03/20	03:00pm	00:30	283 ...
	Tue 24/03/20	09:30am	00:30	
	Wed 25/03/20	04:00pm	00:30	We ...

From the ‘This patient’s appointments’ Window

1. From the appointment book double click on the at the bottom left hand side of the appointment book columns.
2. Select from the drop down list which filter you would like to use to find the patient. For this example I have used the last name field.



3. Type in the patients last name into the field then click on the button
4. Choose the correct patient from the list and select OK
5. Click on the appointment you wish to cancel so that it is highlighted.



6. Click on the button
7. Select the correct option (please see the section above for descriptions of each option)

Please note: you cannot ad an appointment to the clipboard when cancelling this way.

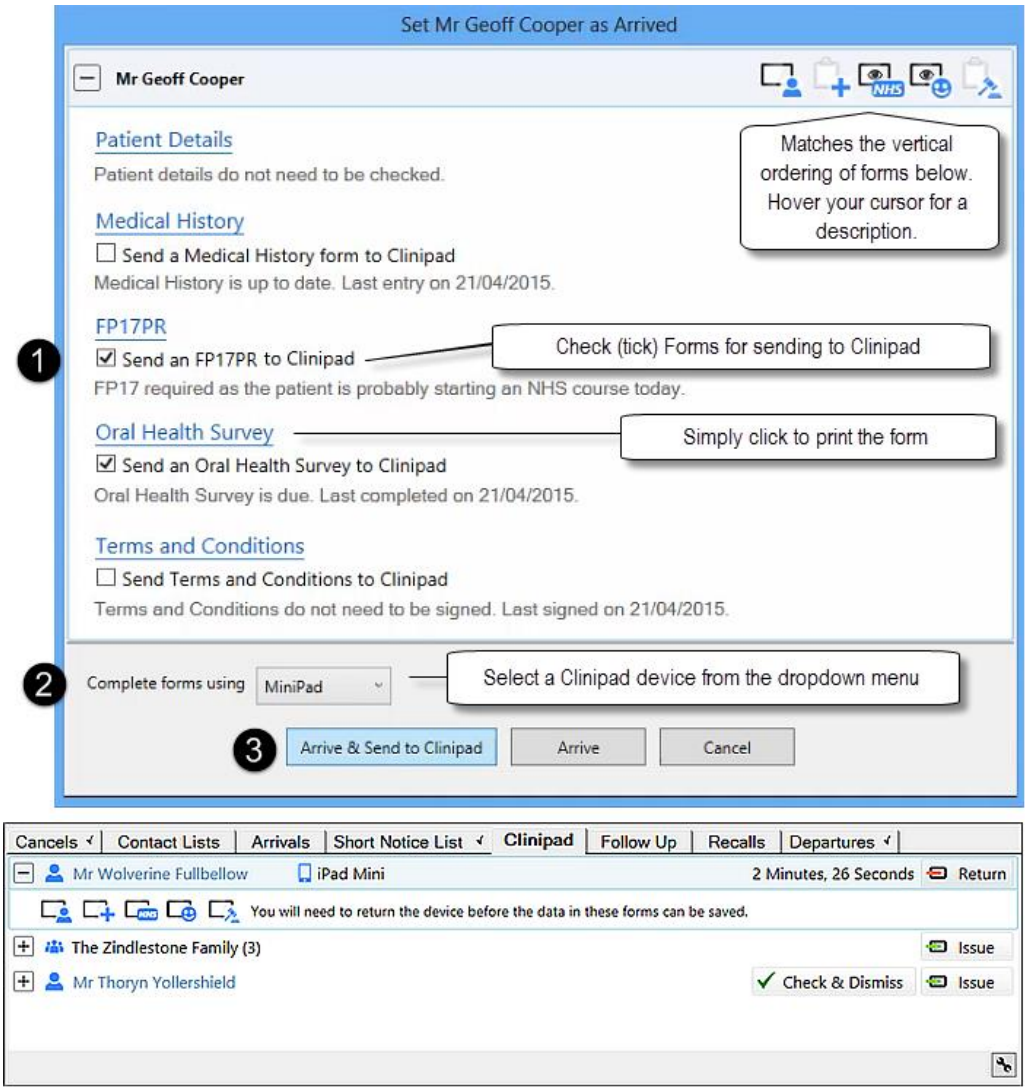
Reception Workflow

To Arrive Patients (Paper)

1. As a patient arrives in the practice, click on the small box next to their name to check them in on the appointment book screen as normal.
2. An Arrival screen will appear, allowing you to select which patient information you want updated/printed.
3. Click the 

button at bottom centre to register the patient as arrived in the normal manner (see also the Arrive button in the screenshot below)

To use Clinipad with Patient arrival (summary of procedure)



1. Check (tick) to specify which forms to send to Clinipad.
2. Select a Clinipad hardware device to issue to the patient.
3. Select Arrive and Send to Clinipad so that EXACT can prepare the Clinipad.
4. Issue the patient with the Clinipad and offer brief instructions.

5. When the patient returns it, click the  button

If you need the patient to use it again, click the  button and hand the Clinipad back.

Once you have returned the Clinipad the patient will now show in the chair for the dentist and the patient can go to into the surgery.

Patient Departure

The To Depart bar will allow the receptionist to carry out the tasks needed before the patient leaves the surgery e.g. pay, rebook or collect any additional information.

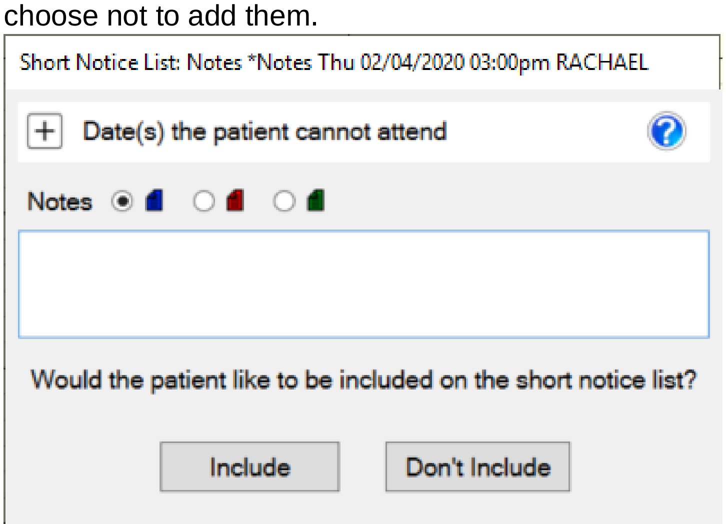
The receptionist will need to click on each of the items in the list and carry out the task.

Short Notice List

Adding a Patient to the Short Notice List

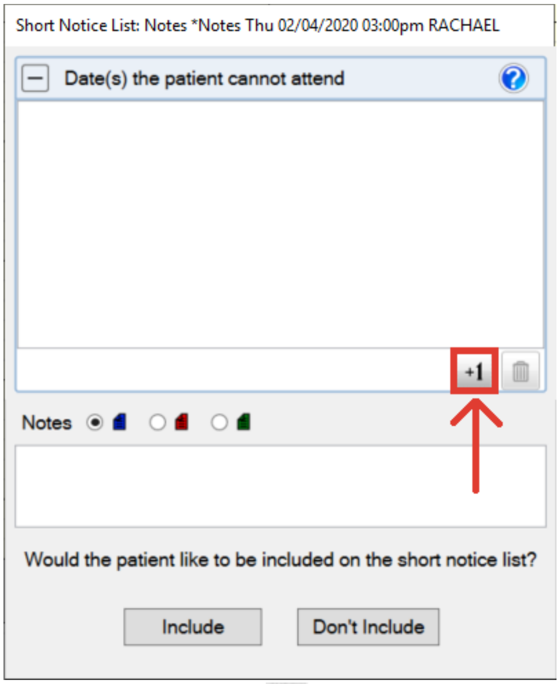
When you create a patients appointment in the next 7 to 40 days, you have the option of adding that patient to a **Short Notice List,** which appears on you appointment book tabs. To add a patient, simply make their appointment as normal, and follow the steps below:

1. When booking a box like below will appear; You can add the patient on with no notes, or choose not to add them.

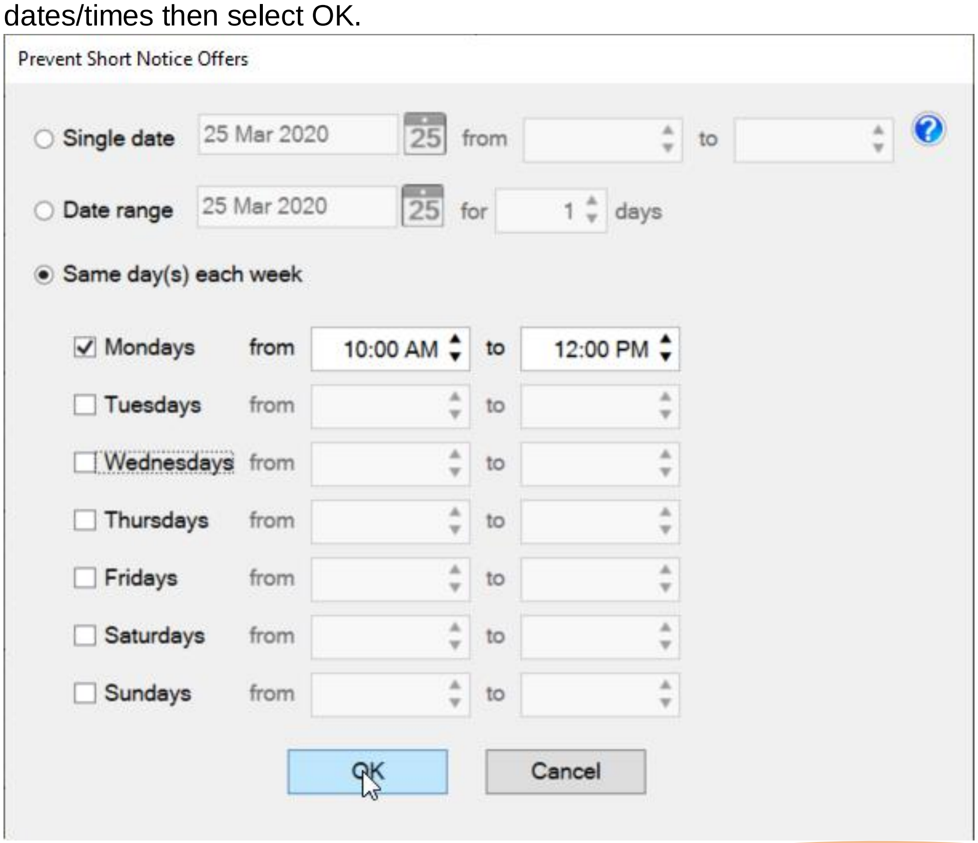


1. If the patient wants to be on this list you set the dates/times they cannot attend. To do this click on the  by 

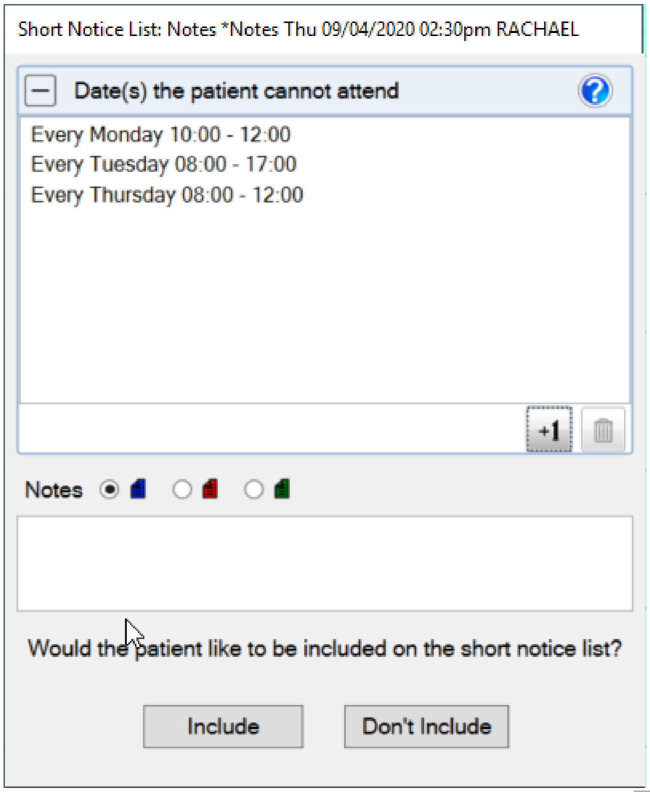
2. Then click on the  button



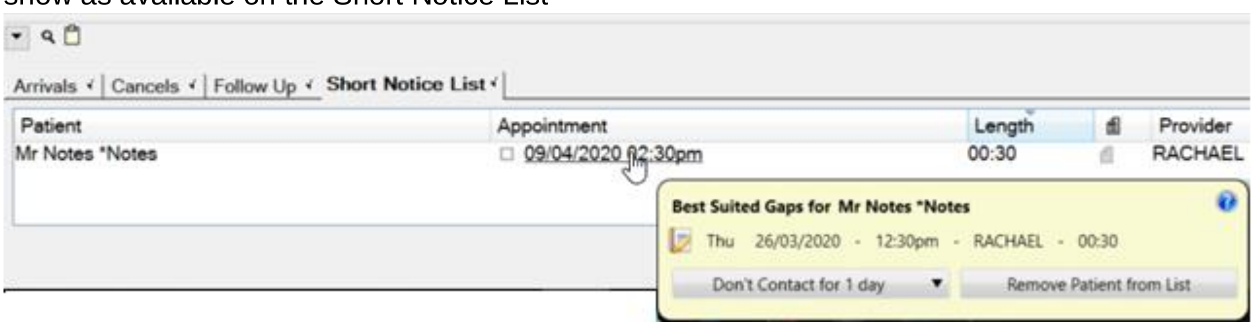
3. Once you press the  you will see the screen below which will allow you to select the dates/times then select OK.



4. Once you have set the dates you should see the screen below



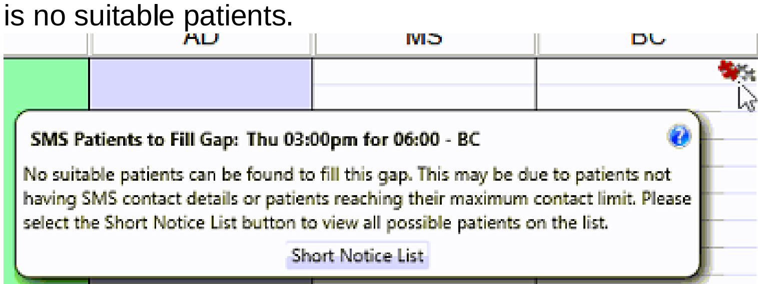
5. Once you are happy with the availability click on Include and he patient will now show as available on the Short Notice List



Contacting a Short Notice patient

When you have white space in the appointment book please use the short notice list steps below;

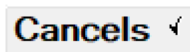
1. Hover over the space in the appointment book and you will see the screen below if there is no suitable patients.



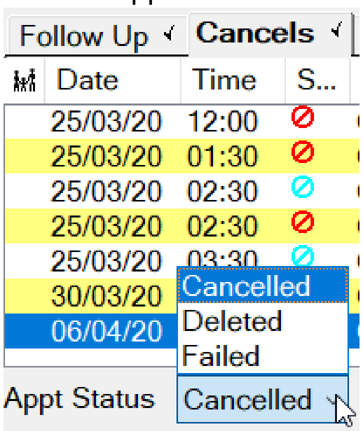
2. If you have patients that fit the criteria then you will be able to select send SMS and it will contact the patients that fit the appointment criteria on the Short Notice List.

Cancels List

Using the Cancels list

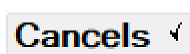
1. Click on the 

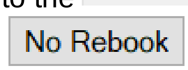
tab on the appointment book
2. Set the 'Appt Status' in the bottom left to the type of appointments you are looking for



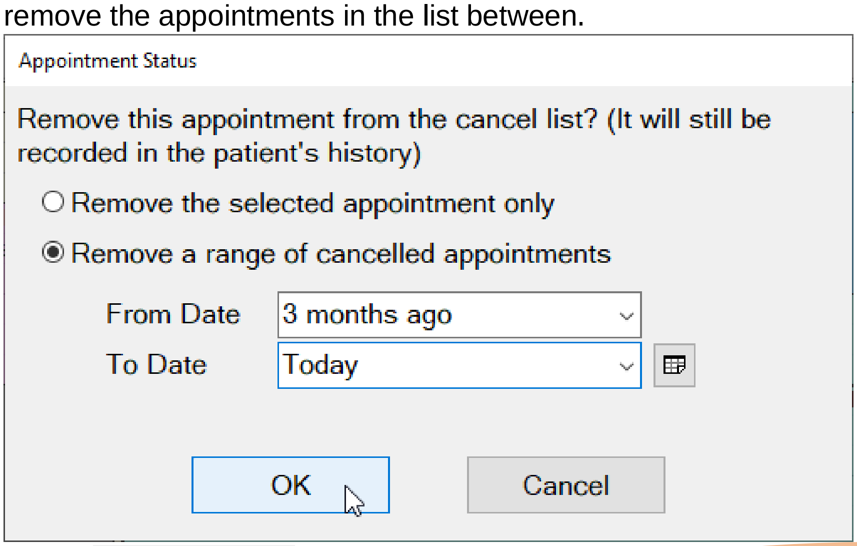
3. If you have contacted a patient from this list and would like to reschedule their appointment you can drag and drop them into the appointment book, alternatively, you can drag them to the clipboard and use the search tool.

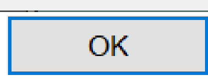
Removing appointments in a date range from the list

1. Click onto the 

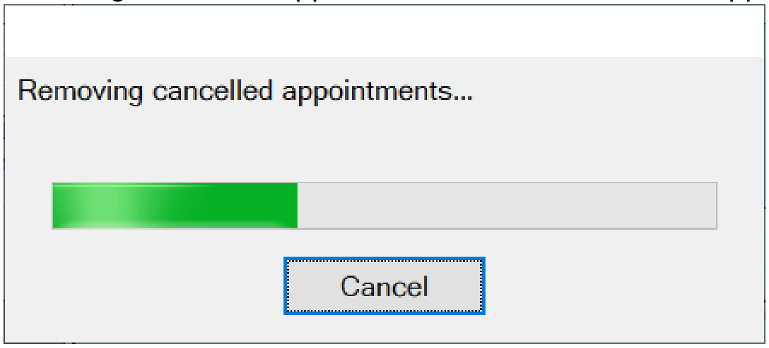
tab
2. Click on 

3. Select 'Remove a range of cancelled appointments' and set the date range you wish to remove the appointments in the list between.



4. Select 

5. A loading screen will appear whilst Exact removed the appointments



6. The appointments within the date range will be removed from the cancels List.

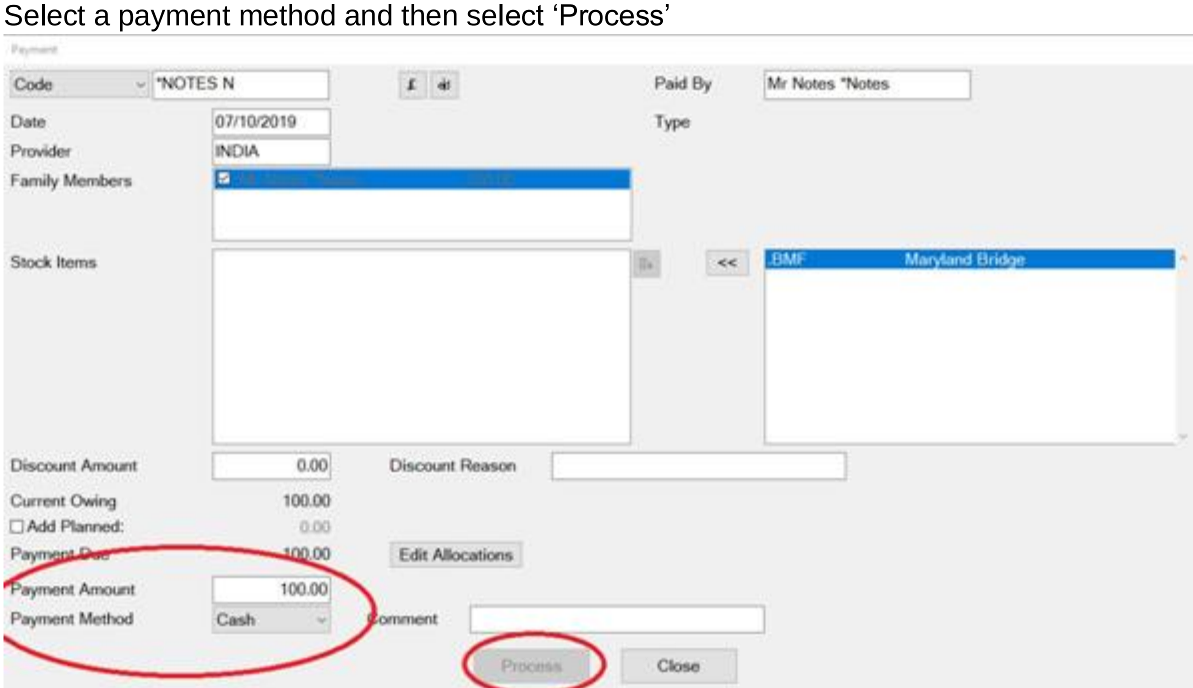
PATIENT TRANSACTIONS

Taking Payments

In order to take a payment in Exact please follow the steps below:

1. Go to the patient record and click on the £ or from the 'To Depart' bar click on 'Take Payment' as shown below

2. The amount this patient owns will automatically be entered into the 'Payment Amount ' box – if the amount needs to be different you will need to manually adjust this.
3. Select a payment method and then select 'Process'



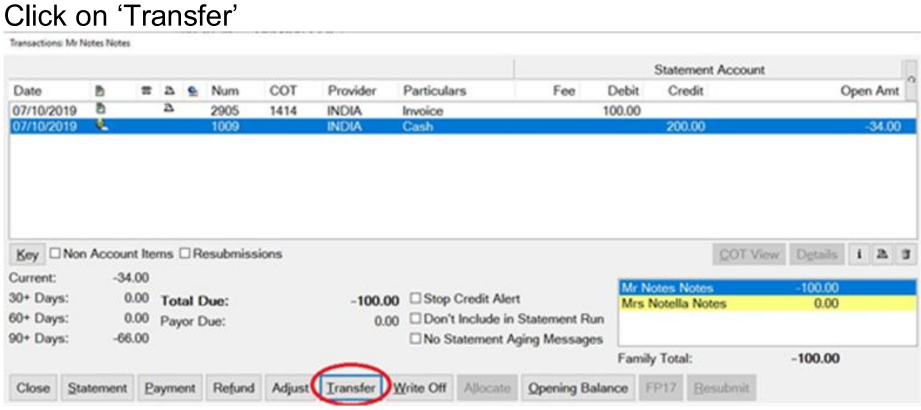
4. You will then be prompted to print a receipt by the window shown below, please note that once you chose a receipt type (NHS or Private) this will be the only one available.

Transferring Payments

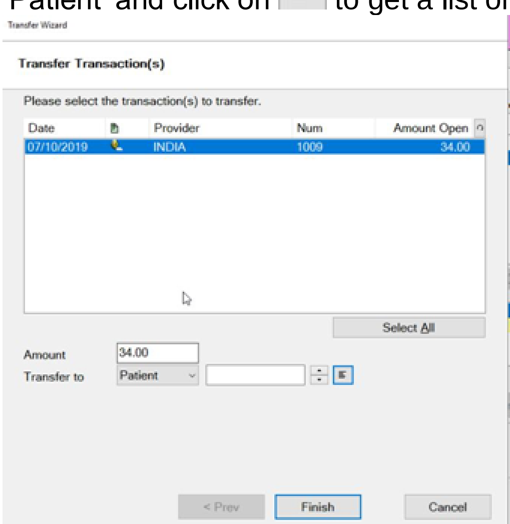
When family members attend the practice they may not pay for their treatment separately and instead opt to make the payment from one card such as when parents attend with their children. Instead of taking multiple payments you can add the full amount to one patient file then send part of the amount to other patients.

In order to transfer money between patients please follow the steps below:

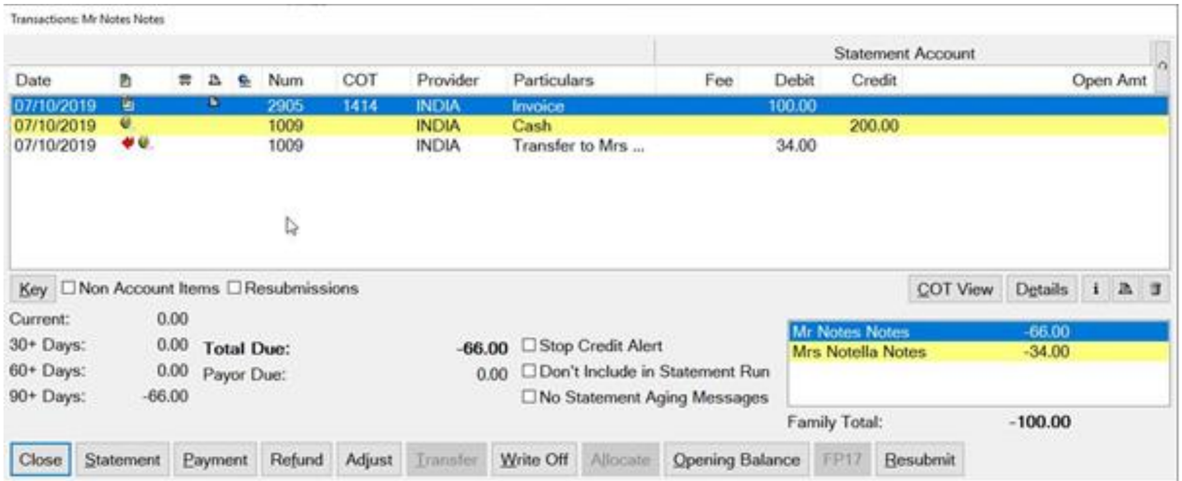
1. Go to the patients records and click on the
2. Take the payment for the full amount of everyone's treatment
3. Click on 'Transfer'



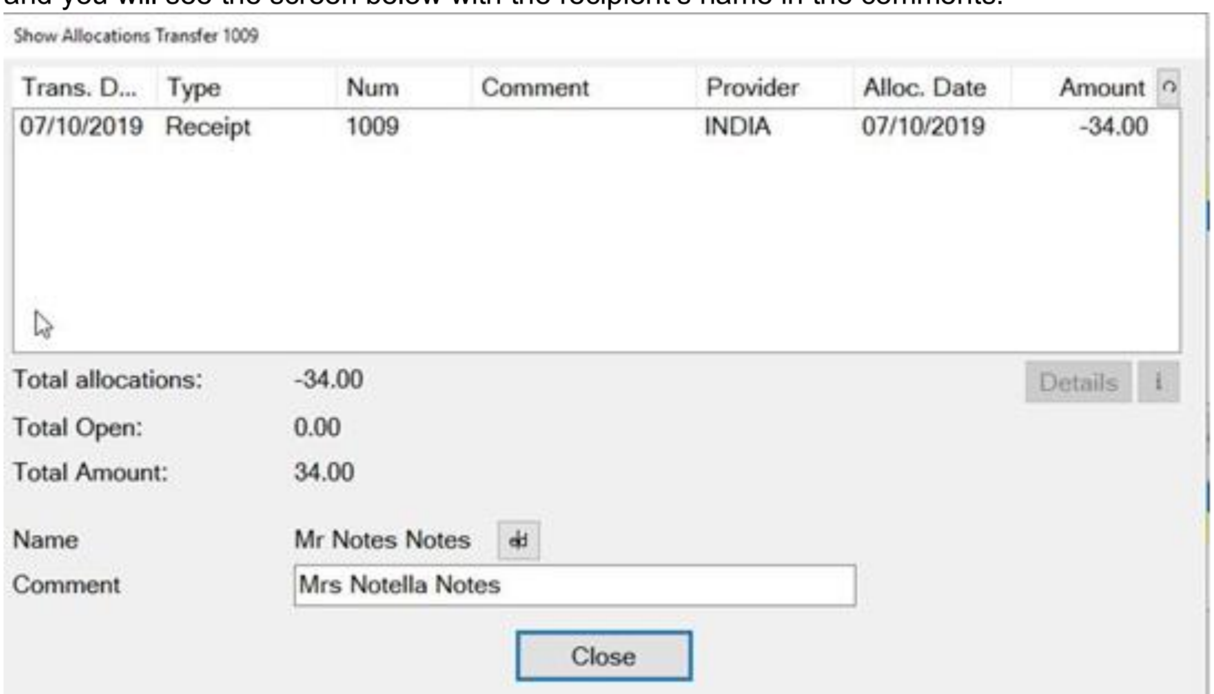
4. Enter the amount you would like to transfer to the patient then click into the field next to 'Patient' and click on to get a list of all the patients at the practice



5. The easiest way to search for a patient is to click on ‘Last Name’ at the top of the window so that all family members appear closer together. Choose the patient you would like to transfer the amount to and then click OK.
6. Once you have filled out all the items on the screen select ‘Finish’
7. You will then see a line showing the transfer amount as a debit on the patient file as show below



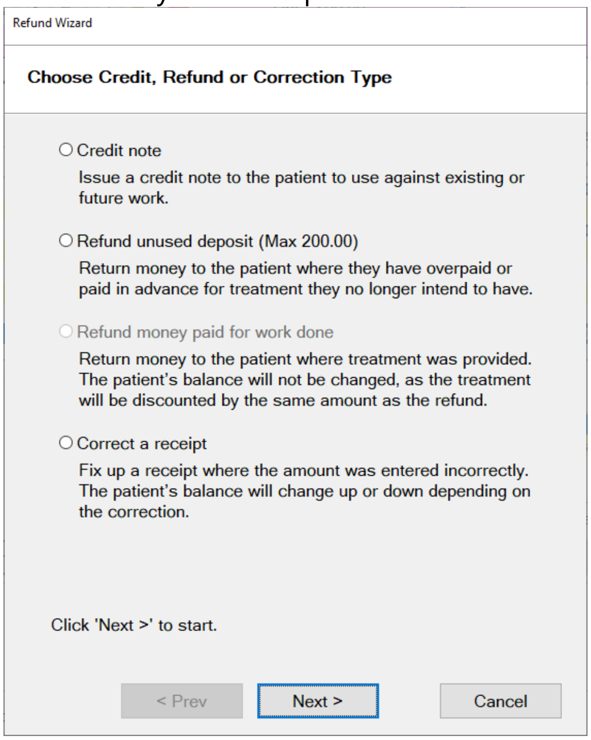
8. If you would like to see the full patient name that the transfer was made to click on and you will see the screen below with the recipient’s name in the comments.



9. Please note that when you transfer the recipient’s name will appear when a statement is printed.

Refunding a Patient

1. The Refunds button is along the row of buttons along the bottom. Simply press this button and you will be presented with this screen:



There are three different types of refunds which are:

I. **Credit Note**: You will use this option to give the patient a discount against work that they have received, or to enter a credit note so they don't have to pay for future work. No money changes hands as a result of this option, and the patients balance will change so that they owe less money.
II. **Refund unused deposit**: You will use this option to refund the patient money where they have overpaid, or have paid for treatment that they now decide not to continue with. The patient will receive money as a result of this, and their credit balance will be reduced.
III. **Refund money paid for work done**: You will use this option to refund the patient money where they have had treatment provided and are being reimbursed. The patient will receive money, but their balance will not be changed as the invoiced amount will be adjusted to compensate.

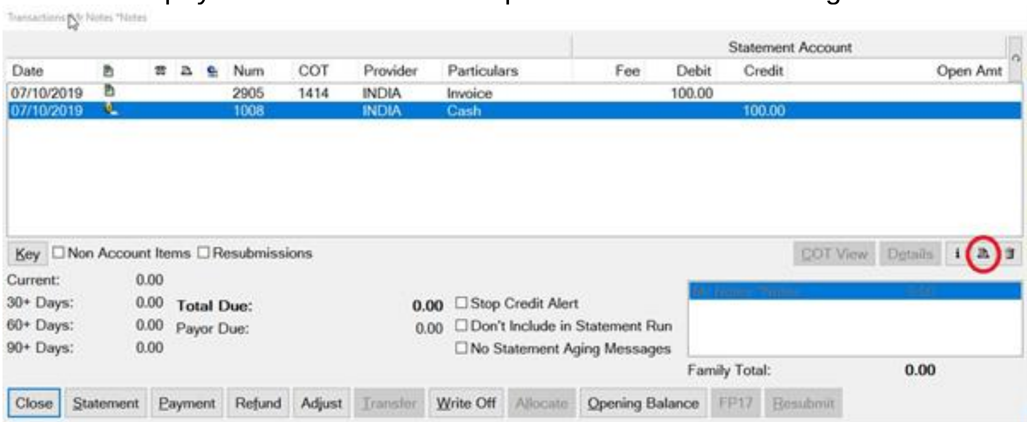
2. Select the Refund option, enter in the refund amount and the reason. Then press Next.
3. Follow the steps in the wizard to the end then select Finish.

Printing a Receipt

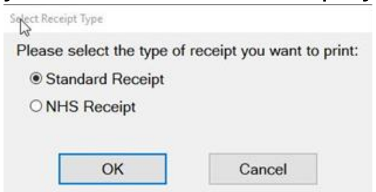
In order to print a receipt in Exact please follow the steps below:

1. Go to the patients records and click on the 

2. Click on the payment then click on the print icon in the bottom right



3. If you have not printed a receipt before you will see the box below, please note that once you have chosen a receipt type it cannot be changed

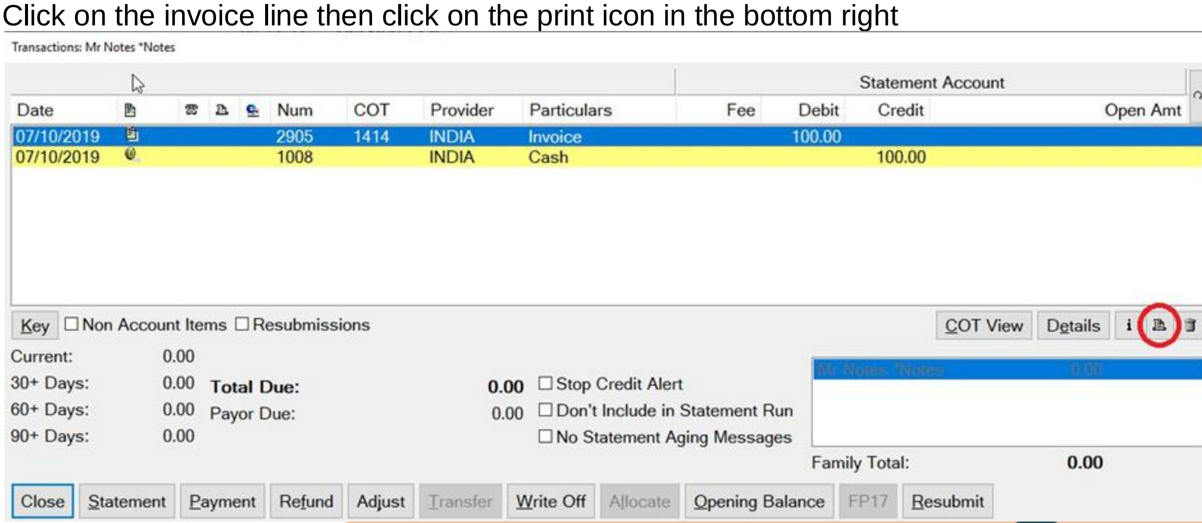


4. You can then choose whether you would like to print or email the receipt to the patient

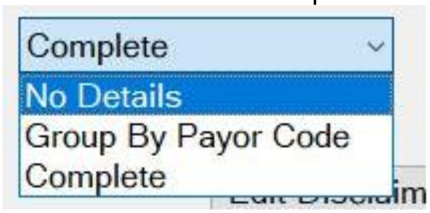
Printing an Invoice

In order to print an invoice in Exact please follow the steps below:

1. Go to the patients records and click on the 
2. Click on the invoice line then click on the print icon in the bottom right

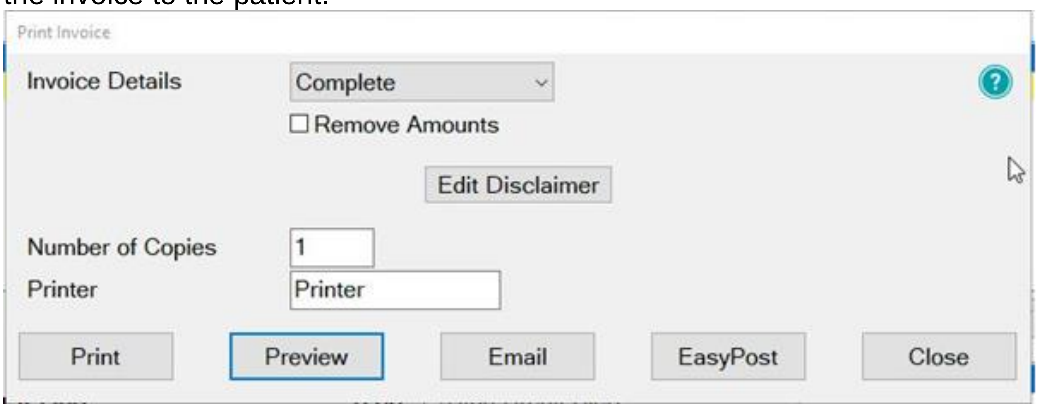


3. You can then use the drop down to choose the level of detail in the invoice



   I. **No details** - Will only show ‘For Professional Services’ as the items done
   II. **Group by Payor Code** – Will order the services by the NHS code
   III. **Complete** – Will give the dates completed and service description
4. If you would like to remove the breakdown of the total by service item click on ‘Remove Amounts’

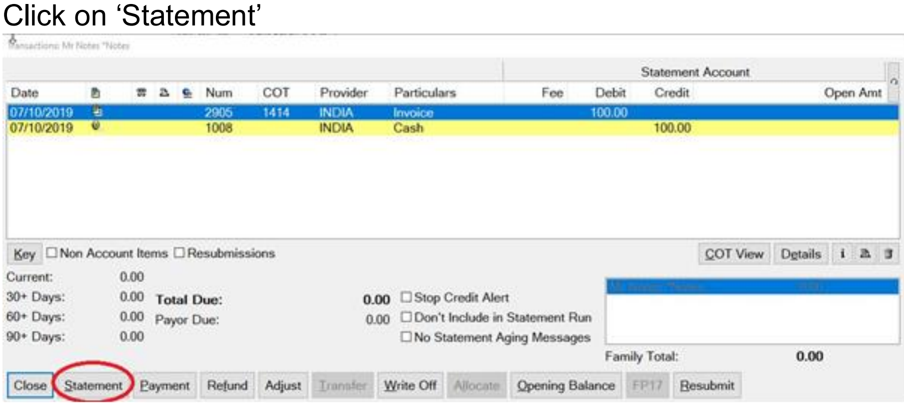
5. Once you are ready you can print, email or select easy post (if you are using it) to send the invoice to the patient.



Printing a Statement

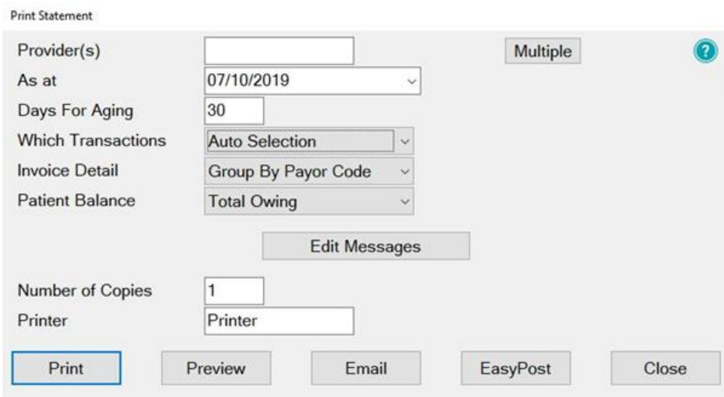
In order to print a statement in Exact please follow the steps below:

1. Go to the patients records and click on the 
2. Click on ‘Statement’

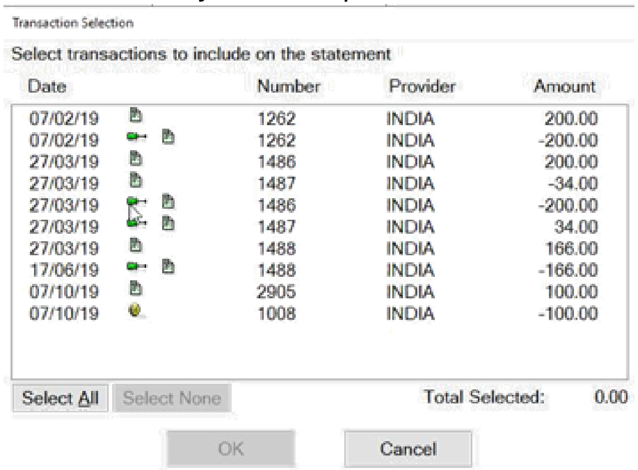


3. You then choose an individual provider if you would only like to show one dentist/hygienists work or leave this field black if you need to show treatment for everyone

The ‘As at’ date is best left as the date the statement is being created as it will give the patients total owing as the amount of the date set – having an up to date value will be easier for the patient to read.



4. For ‘Which Transactions’ you have three options to choose from:
   Auto selection – this will choose all treatment and exclude resubmissions
   Manual Selection – this will allow you to choose which items are included on the statement and you will be presented with the box below to make your selections



   All transactions – will bring up all lines from the transaction window including resubmissions.
5. Once you are happy select print, email or easy post to send this to the patient

Adjusting an invoice

If you have not used adjustments before you may need to use the steps below to set up a new adjustment type in Exact.

Please Note: You may need to be logged in as a SUPER user to carry out the following steps:

If you already have an adjustment types set please ignore the steps below

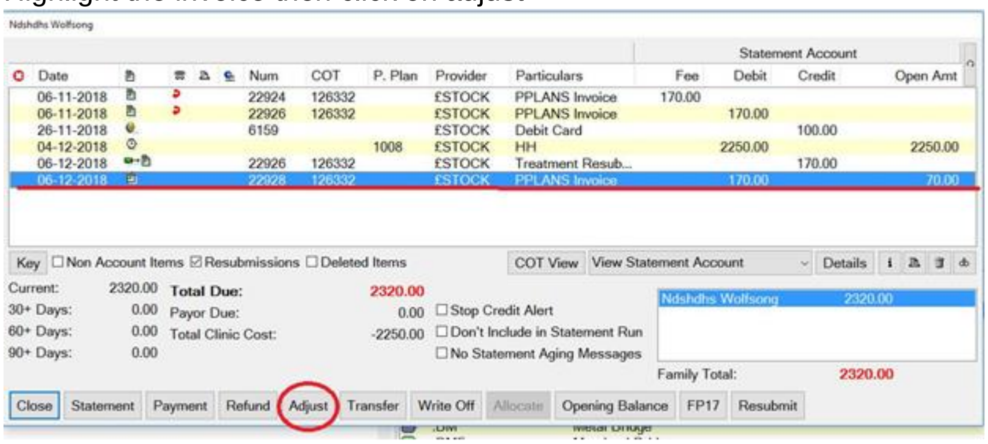
1. Go to any patient file
2. Click on '£' sign
3. Highlight either an invoice or payment in the box
4. Click on 'Adjust'

5. Where it says 'Adjustment Type', click in the box and click the lined icon to the right of this – a list of all correct adjustment types will be listed
6. Click +1 - located in the bottom right hand corner of the 'View Adjustment Types' box
7. Enter a code of your choice
8. Enter a full description of your choice
9. Select 'Invoice Corrections
10. Click OK

The new adjustment type has now been set up.

To adjust the price of an invoice please follow the steps below:

1. Go to the '£' sign on the patients file
2. Highlight the invoice then click on adjust

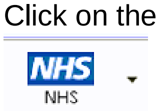


3. On the 'create adjustment' screen add the amount that you need to adjust it by. If you add a whole number it will mean the patient owes more and adding a minus number means the patient pays less.
4. Press OK and this will either increase or decrease your invoice amount.

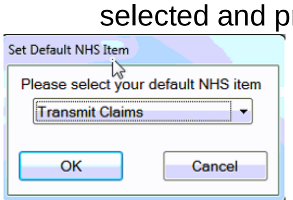
TRANSMISSIONS & RESPONSES

How to Transmit

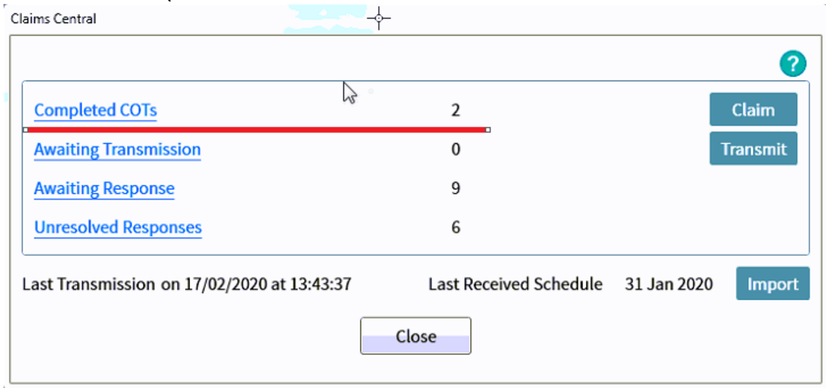
1. Click on the NHS icon on the workspace at the top of Exact



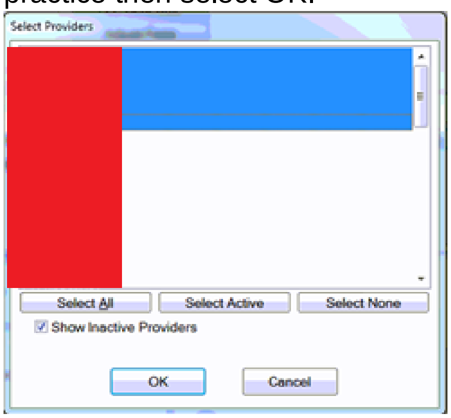
   a. You may be presented with the window shown below ensure 'Transmit Claims' is selected and press OK – this screen will only appear once.



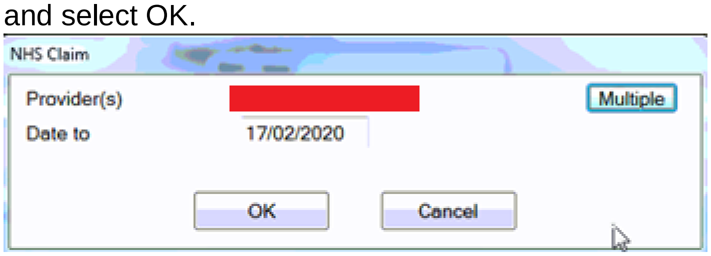
2. Click on Claims Central
3. From the screen you will see the number of COTs awaiting to be sent on the 'Completed COTS' line. (these are all the claims the dentist has TC'd since your last transmission)



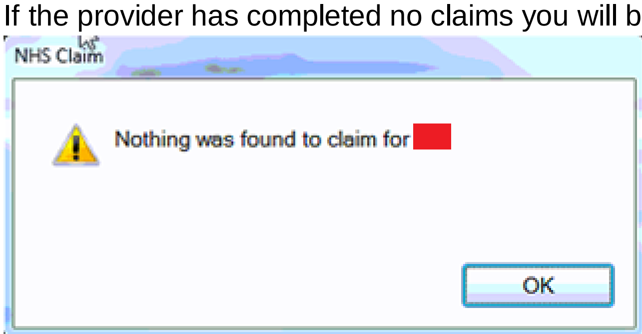
4. Click on Claim
5. Click on Multiple then select all of the providers than carry out NHS treatment at the practice then select OK.



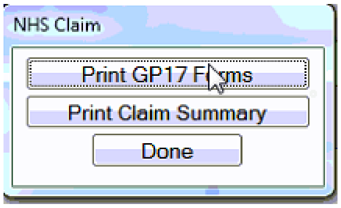
6. You will then see the screen shown below ensure that the 'Date to' shows today's date and select OK.



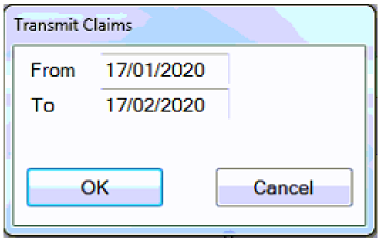
7. If the provider has completed no claims you will be shown the box below select OK.



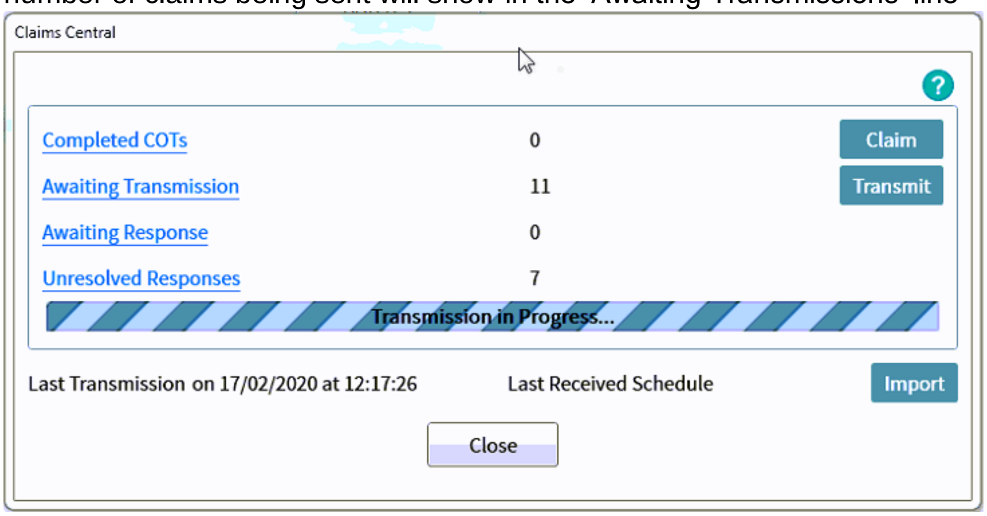
8. You should then see the screen below, if you would like to print a list of all the claims sent select ‘Print Claim Summary’ if not select ‘Done’



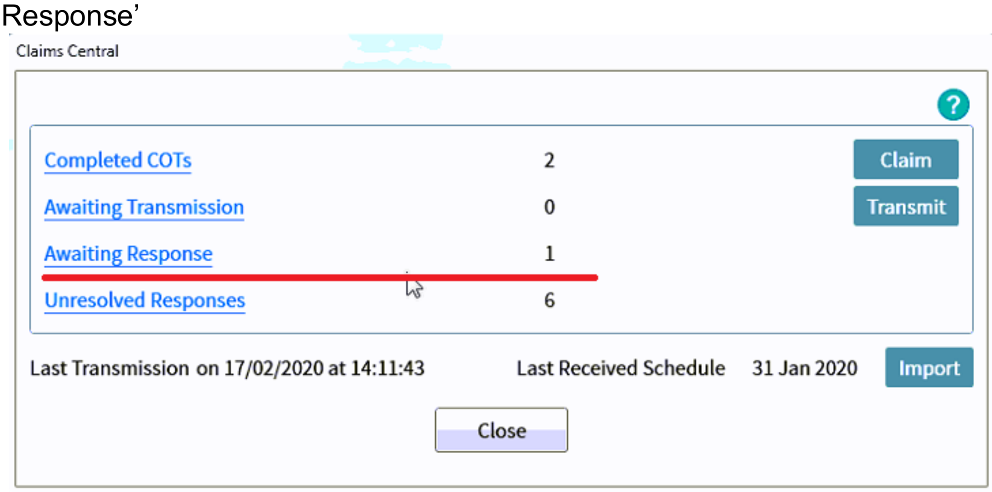
9. You will then see the screen below and it will automatically display a three month window. Do not amend these dates and select OK.



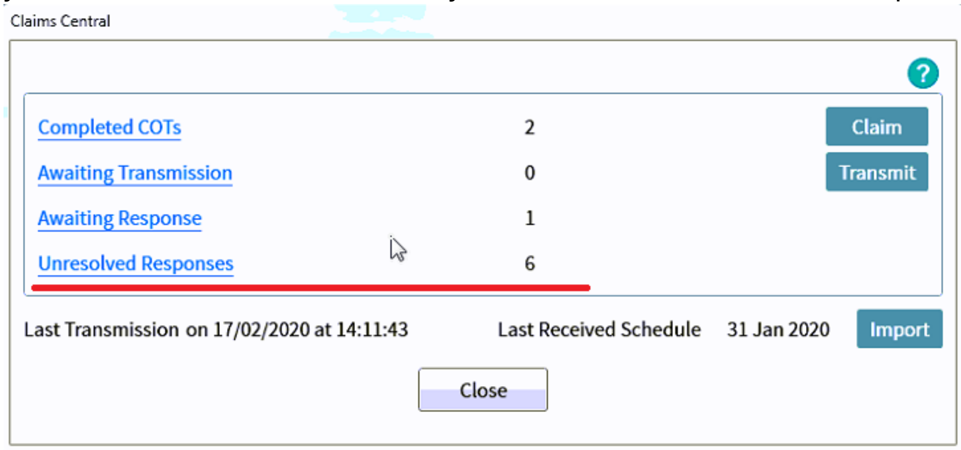
10. The screen will then show the transmission in progress bar along the bottom and the number of claims being sent will show in the ‘Awaiting Transmissions’ line



11. Once the transmission has completed the claims will move down into ‘Awaiting Response’



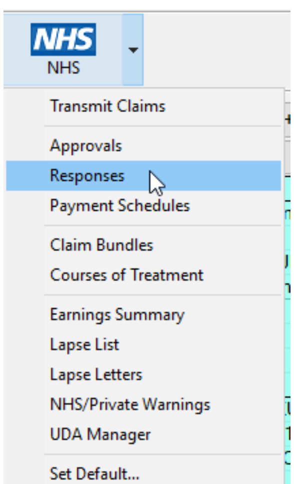
12. Once you do another transmission anything responses the board have sent regarding your claims will come back in. They will show under ‘Unresolved Responses’



13. To view responses you can click on ‘Unresolved Responses’ on the claims central screen on select the arrow shown next to the NHS button and select ‘Responses’

Viewing NHS Reponses

You can view NHS responses by clicking on ‘Unresolved Responses’ from the claims central screen shown in the ‘How to Transmit’ section. Alternatively, you can access NHS responses from the NHS button on the workspace by clicking on the drop down arrow and selected responses as shown below.



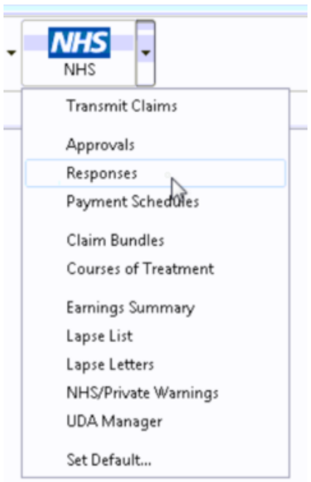
Dealing with NHS Responses

Please use the link below with a link to the most common NHS responses and how to resolve them within Exact.

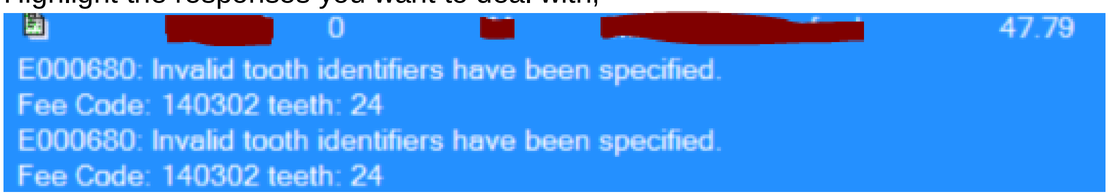
https://www.soesupport.co.uk/edental/responses.html

How to Resubmit Responses

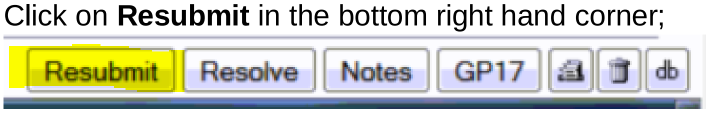
1. To amend / resolve any responses you receive;
2. Click into responses under the NHS drop down.



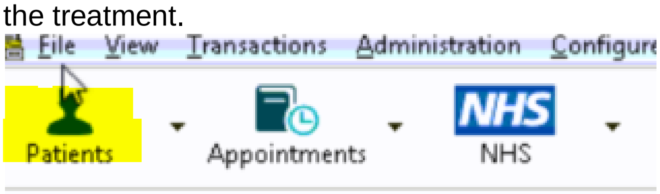
3. Highlight the responses you want to deal with;



4. Click on **Resubmit** in the bottom right hand corner;



5. Once you have resubmitted, click on to the **Patient** icon at the top of your screen and it will load the patient that you have resubmitted the treatment for and allow you to amend the treatment.



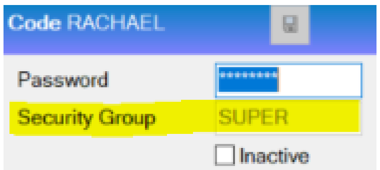
6. Before you TC the treatment back through, please check that you have **"prompt for date when charging"** checked under your **user settings;**

USER SETTINGS

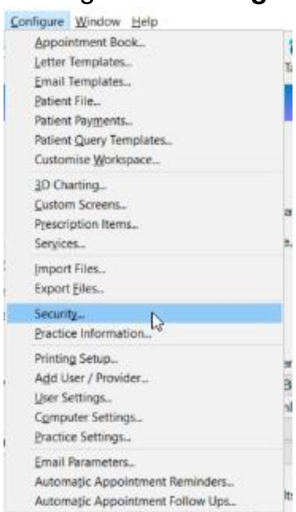
Adjusting Security

A users security defines what they have the ability to do one the system, these are divided into groups that users are a part of. If you adjust a security setting it will amend it for **all users in that group. You will need to be a super user or admin user to amend security groups**

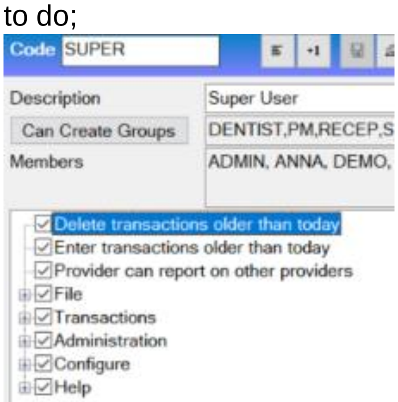
1. First to find out what security group someone is in, go into **configure > user settings**
2. Find the user you want to look at and you can then see the security settings underneath the users name and password;



3. Then go into **Configure > Security**



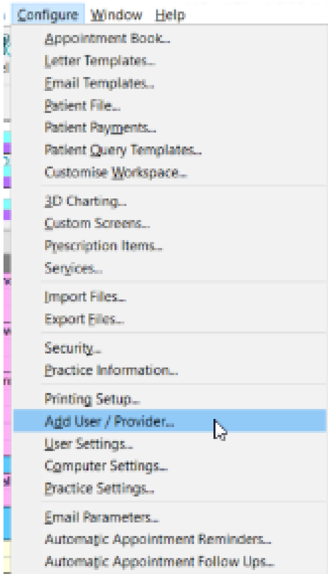
4. Using the **Code** section find the group you want to amend. Everyone listed underneath is in this security group and everything ticked it what they have the ability to do;



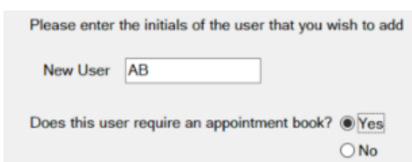
5. You can then click in these subsections and amend the security settings for that group.

Adding New Users

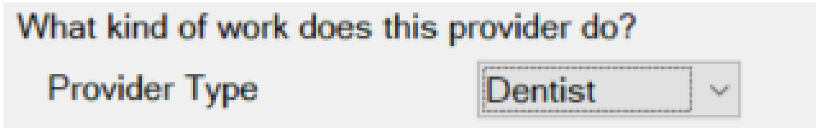
1. To add a new user or Provider into Exact you must first click on **configure > Add User / Provider;**



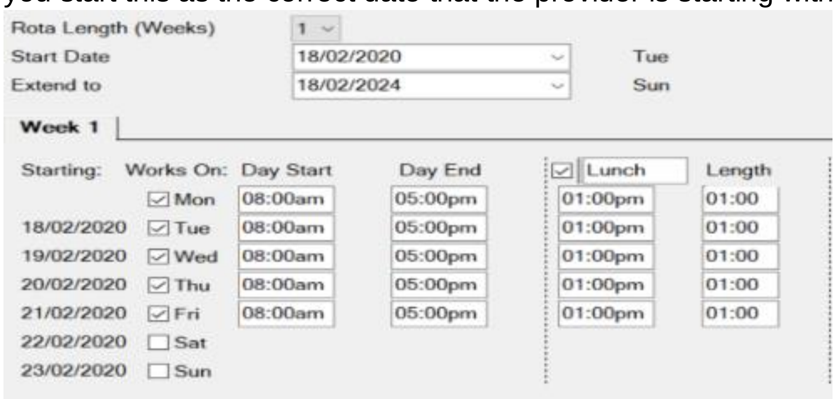
2. Then on the first window on the Add User Wizard, put in the way you want the user to appear on the appointment book and user name when logging in.
3. When selecting if they require an appointment book, if they are a provider but aren't starting yet, still click yes – this is what makes them a provider and not an admin user.



4. Click **Next >** and the next screen will want you to select the security group that the provider requires and add in a temporary password for them to just get logged in (make sure you tick **"User must change password at next login"**
5. Press **Next>** and the next page will be for any additional details you wish to add such a the providers name and qualifications. This is the section where you fill in the provider type;



6. Press **Next >** and this page you can add in the providers address / telephone numbers and an email address if they would like to receive an email every time an appointment is made with them.
7. Press **Next >** and this section is where you can pick the providers appointment book colour and text colour.
8. Press **Next >** where you will be asked to tick which recall type the provider will set, either dentist or hygienist
9. Press **Next >** and you will be prompted to add in the providers working rota, make sure you start this as the correct date that the provider is starting with you.



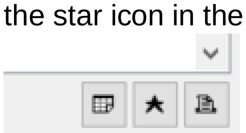
10. The next two pages will asked you which appointment book (if you have more than one) that you want the provider to show in and how they want their stickman (patient at the door) settings to show.
11. Press **Next >** and this is where you can add in the provider NHS details and press **Finish,** this will then add the new provider to the diary and open their rota from the dates you selected.

REPORTING

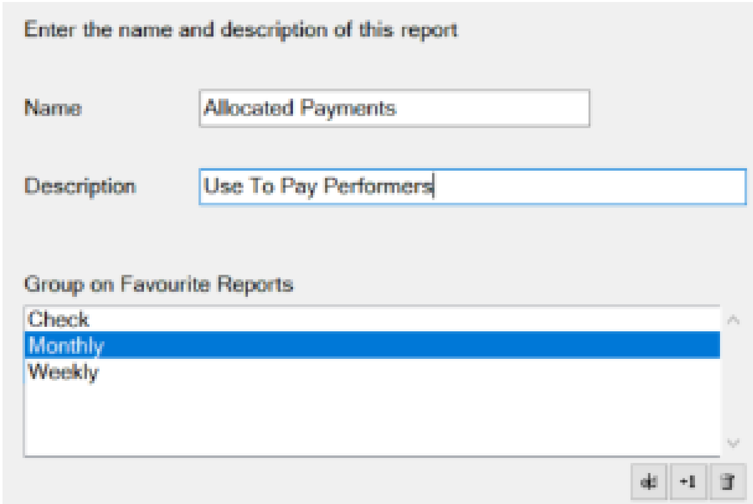
Adding Reports to Favourites

When you are in Exact Reports you have the ability to add reports that you use frequently into your favourites tab, this will be for the user that is currently logged in and each user will have to add their own favourites in.

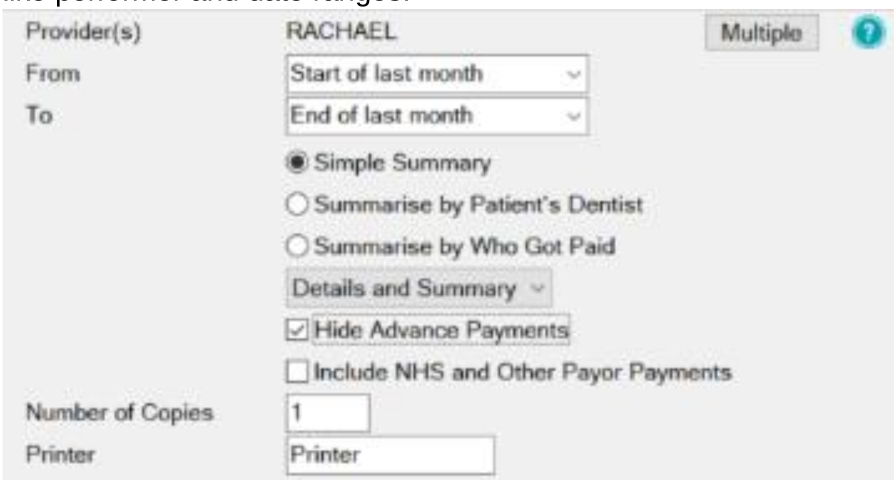
1. Go into reports and highlight the report you want to add into your favourites, and press the star icon in the bottom right hand corner;



2. You can then choose or add the group as monthly / weekly or daily, depending on the frequency that you run it. With a description if you would like.



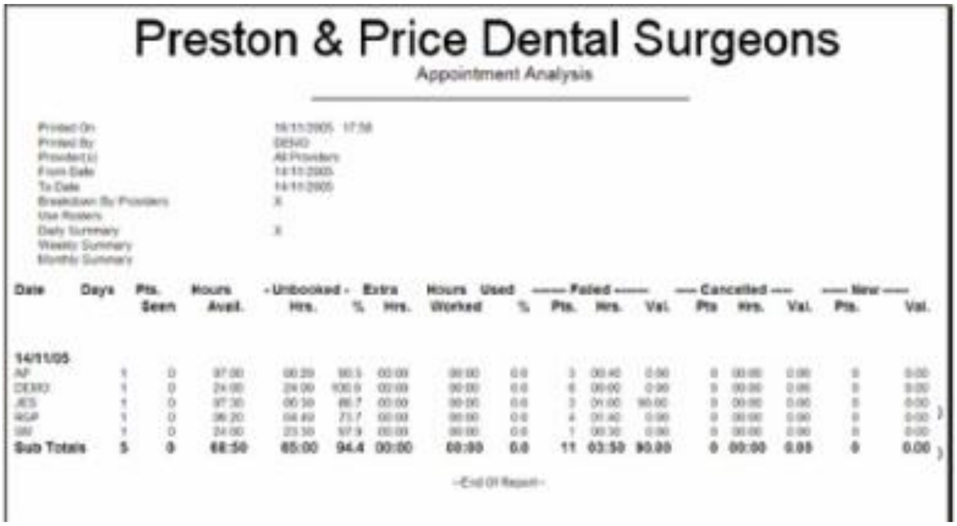
3. You will then be able to fill out the relevant fields that you use when running the report, like performer and date ranges.



4. This will then save into the favorites tab to be run easily with the prefilled dates / performers in place

Appointment Analysis Report

This report is used to print a summary of appointments, and should be run on a regular basis, usually weekly. As the information is taken from the appointment book, it is important to ensure the status of each appointment is accurate, by ensuring patients are being checked as having arrived, being moved into the chair, appointment complete, etc. This is accomplished by using the 'Arrivals Door' feature.


Preston & Price Dental Surgeons

Appointment Analysis

Date	Days	Pts. Seen	Hours Avail.	Unbooked Hrs.	Unbooked %	Extra Hrs.	Hours Worked	Used %	Failed Pts.	Failed Hrs.	Failed Val.	Cancelled Pts	Cancelled Hrs.	Cancelled Val.	New Pts.	New Val.
14/11/05																
Sub Totals	5	0	68:50	65:00	94.4	00:00	00:00	0.0	11	03:50	90.00	0	00:00	0.00	0	0.00

--End Of Report--

1. Leave the **Provider(s)** field blank to summarise the Appointments for the whole practice.

   An individual provider can be selected from a list by using either the button or the button.
2. Clicking the Multiple button will allow a combination of providers to be selected.
3. The ‘From’ and ‘To’ Date fields are used to define the date range for the report.
4. Other fields / options:

Option	Field
Breakdown by Providers	This will separate the report into sections broken out by provider, with subtotals for each day.
Use Rosters	This will show any rostered time that is being used within the appointment book.
Daily, Weekly or Monthly Summary	This report can be summarised by day, week or month. Select the option required by clicking on the appropriate option.

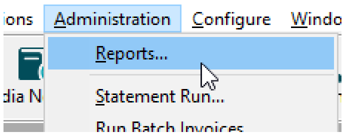
The report includes the following:

1. Number of failed or cancelled appointments
2. Number of new patients
3. Number of patients seen
4. Estimated value of treatments. In order for the value to appear, treatment must be book from planned treatment, or the booked service must have a value associated with it (set under Configure > Services).
5. Average wait time (from the 'Arrivals door').

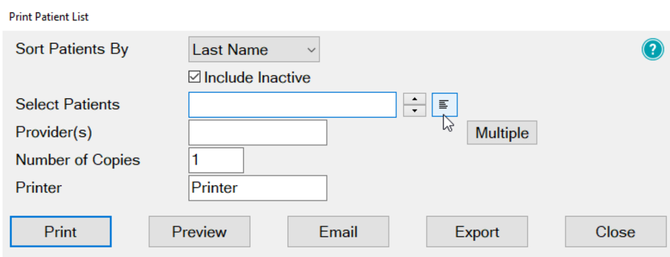
FTA List (Patient List)

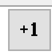
To get a list of patients who have failed their appointments in a given time period please follow the steps below:

1. Go to Administration > Reports

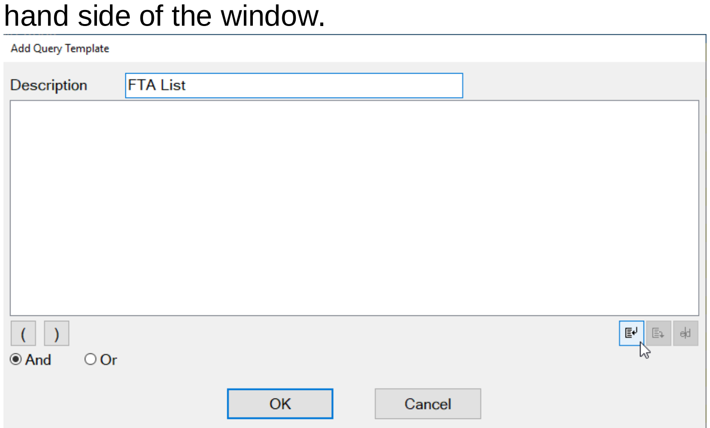


2. Scroll through the list and select ‘Patient List’ and double click on it.
3. Click into the ‘Select Patients’ field then click on the list button to the left

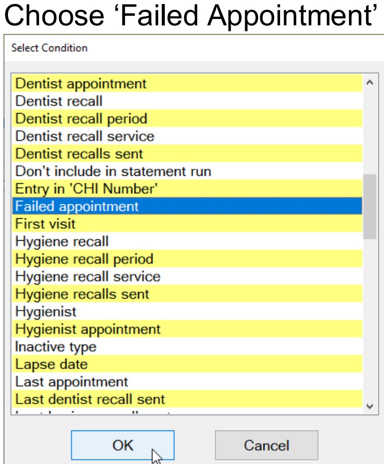


4. Click on the  in the bottom right hand corner

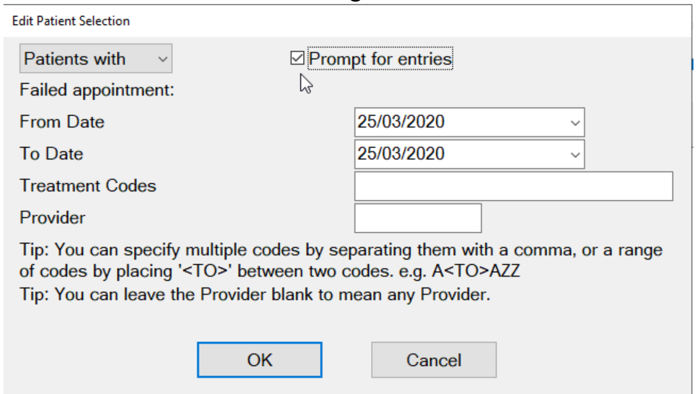
5. Enter ‘FTA List’ in the description field then click on the  button to the bottom right hand side of the window.



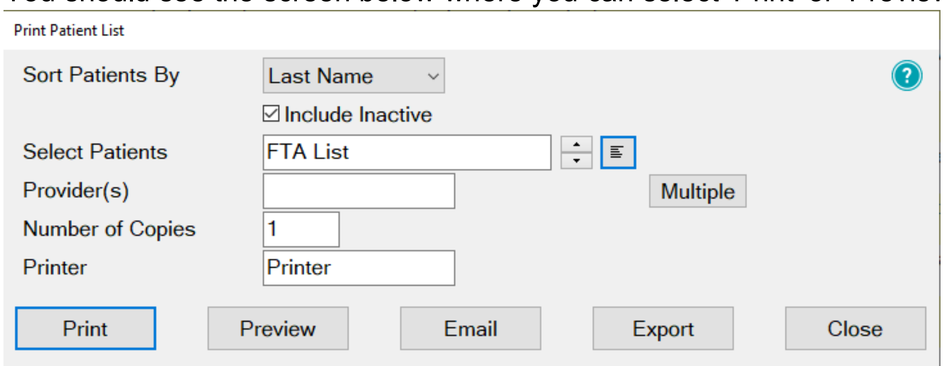
6. Choose ‘Failed Appointment’ from the list then select OK



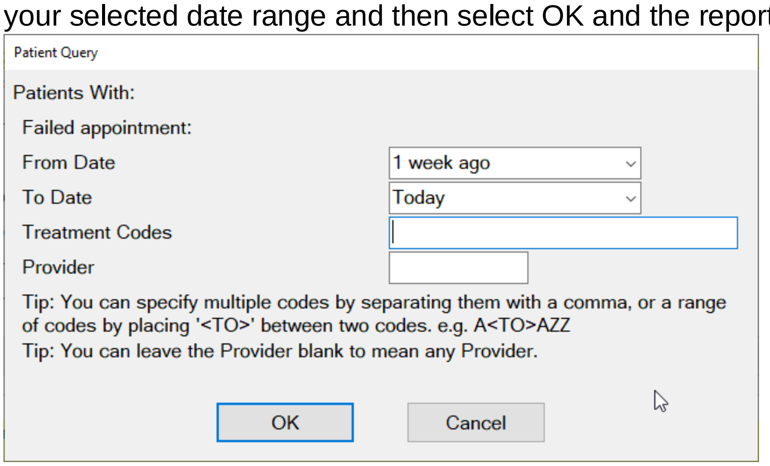
7. On the screen that appears leave the dates as they are but put a check in ‘Prompt for entries’ (this will allow you to select the date range each time you run the report) the select OK and select OK again.



8. Ensure ‘FTA List’ is highlighted and click OK
9. You should see the screen below where you can select ‘Print’ or ‘Preview’



10. Once you select ‘Print’ or ‘Preview’ you will see the screen below where you can enter your selected date range and then select OK and the report will run.



When you run this list again skip steps 4 – 7.

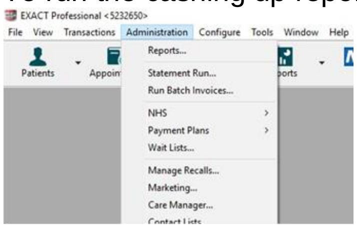
Cashing Up Report

Running the Cashing Up Report

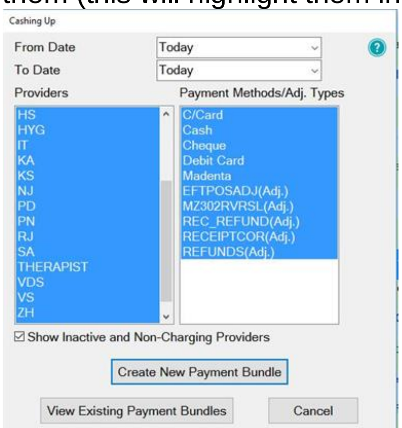
The ‘Cashing Up’ report is used to summarise all current payments received for the practice on a given day or for a date range. This report is run daily for all payments taken at the practice. It is not necessary to create a ‘Cashing Up’ slip for any payment method deposited directly into the Bank Account; e.g. Direct Debits.

Payments can be part of only one 'Cashing Up' report - once the report is run (using the Create New Payment Bundles button), previous payments can be viewed using the View Existing Payment Bundles button.

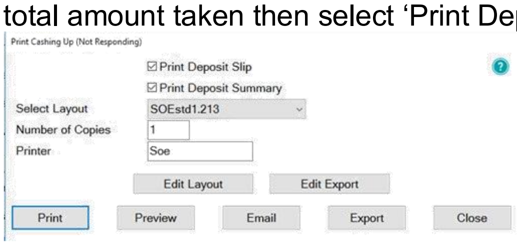
1. To run the cashing up report go to Administration > Reports



2. From the list of reports select ‘Cashing Up’ and double click on it
3. When you are shown the screen below set the to date and from date as ‘Today’ and select all the required providers and payment method/adjustment types by clicking on them (this will highlight them in blue)



4. Once this is done select ‘Create New Payment Bundle’
5. If you would like the patents names select ‘Print Deposit Slip’ if you would only like to total amount taken then select ‘Print Deposit Summary’ (You can select both of these)



6. Click ‘Print’

Using the report for two checks

The cashing up report is designed to be used for end of day banking. In order to run the cashing up report twice a day you will need to follow the steps above for the first time you run the cashing up e.g. before lunchtime then follow the steps below at the end of the day:

1. To run the cashing up report go to Administration > Reports
2. From the list of reports select 'Cashing Up' and double click on it
3. Click on View Existing Payment Bundles
4. Select the bundle with today's date from the list
5. Click on Update...
6. This will add any payments taken from after lunchtime to the end of the day to your existing bundle.

List Outstanding Treatment Report

When to use this report:

It is recommended that this report is run at regular intervals, at least once a month or once a week, for each Provider.

Purpose:

This is used to print a report listing the patients who have:

- Unclaimed complete treatment plans (all items charged but not TC'd)
- Incomplete treatment plans (plans which are partially charged)
- Incomplete treatment plans with uncharged items (plans which have items which are ticked but not charged).
- For these three options, you can include
- All treatment plans (will show all three options above)
- Only plans with completed treatment

> ***NOTE:*** A Course of Treatment/Treatment Plan may have chart items whose planned or completed dates span a range of dates. In the case where some of the chart items have planned or completed dates ***outside*** the date range selected for the report, use the ☑ **Include all other treatment in the same COT/Treatment Plan** checkbox to specify whether those chart items will be included or not.

To run the 'Outstanding Treatment' Report

1. Select Administration > Reports > List Outstanding Treatment:
2. The Sort Patients By option allows the report to sort on a number of criteria:
3. Use the Select Patients field to select or define a query for the patients in the 'From' and 'To' date range.

In the case where some of the chart items have planned or completed dates *outside* this date range, use the ☑ **Include all treatment on matching COTs/Treatment Plan** checkbox to specify whether those chart items will be included in the Report or not.

For example: If you run the report for a date range over the last month with this option de-selected, it will display any COTs *with their information* from the last month only, and any COTs prior to the last month will display as headings only. However, if you select this option it will show those matching COTs prior to this last month *with their treatment item information*, and COTs within the last month also *with their treatment item information*.

TIP: A useful query to use would be for patients with no future appointments booked. That way any patient who appears on the list will either need to be invoiced for completed work or scheduled for another appointment.

4. Optionally select a **Provider** from the list by clicking in the field and using the button. The report will then print for the selected provider only.
   Use the **Multiple** button ito select more than one provider.
5. Alternatively, you can select a **Provider Category** rather than one or more providers.
6. Use the Treatment **From** and **To** dates to specify the date range for the planned or completed treatment. Other options are:

Tick	To
List Treatment Details	Include the Treatment Plan details in the report.
Include Inactive Treatments	Include any treatment that has been marked as inactive.
Include Misc Treatments	Include any miscellaneous treatment carried out.

Report Output

The example below shows an **Outstanding Treatment** report for all patients, with all checkboxes selected. Included in this report are:

- Patients who have had Treatment completed in the last 2 months that was not charged; e.g. the treatment has been saved in the **Chart** tab but the **Charge** button has not been pressed.
- Treatment that remains planned on the patients chart tab.
- Treatment details.
-

Ideally, the report will be run with each option selected.

For the **Treatments not completed** option, once the list has been printed, where the patient does not have any further appointments they can be contacted and if necessary the Course of Treatment closed and sent to the Payor as incomplete treatment.

For the **Treatments completed but not charged** and the **Treatments completed but not claimed (TCed)** options, there will be duplicates in the report, as TCing treatment also acts as a method of charging. If the treatment has not been TC'd then it may not have been charged also.

When selecting these options it may save time when cross-referencing patients to run one of the reports, deal with the patients who appear on the list, and then run the other option separately.

MANAGING WHITE SPACE

Care Manager

Please use the link below to access a video guide for using Exact's Care Manager

https://www.youtube.com/watch?v=uvpU10fjsdY

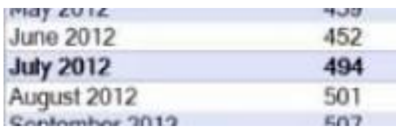
Recalls

Monitoring the graphic display

This is a Live, real time display, so if you change a recall date, the list updates immediately. You can double-click any month for a detailed Month View.

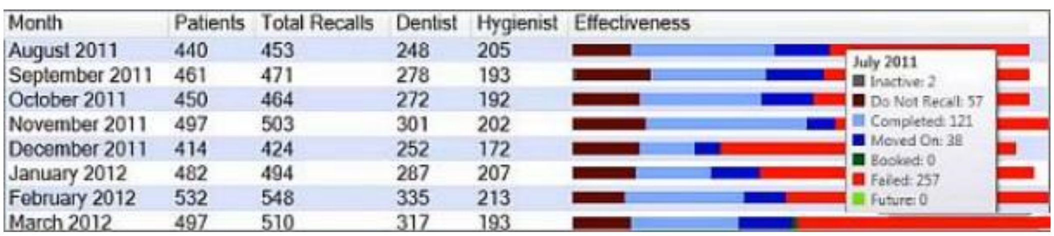
The main screen displays figures and a colour graphical display per month:

By default the current month is identified in bold:



June 2012	452
July 2012	**494**
August 2012	501

Detail:



Month	Patients	Total Recalls	Dentist	Hygienist	Effectiveness
August 2011	440	453	248	205	
September 2011	461	471	278	193	
October 2011	450	464	272	192	
November 2011	497	503	301	202	
December 2011	414	424	252	172	
January 2012	482	494	287	207	
February 2012	532	548	335	213	
March 2012	497	510	317	193	

For each month you can see numbers for Patients, the Total Recalls, and the Total figure split between Dentist and Hygienist.

Note that Therapist recalls could constitute part of either the Dentist or the Hygienist figures, depending how you have configured the Recall Manager.

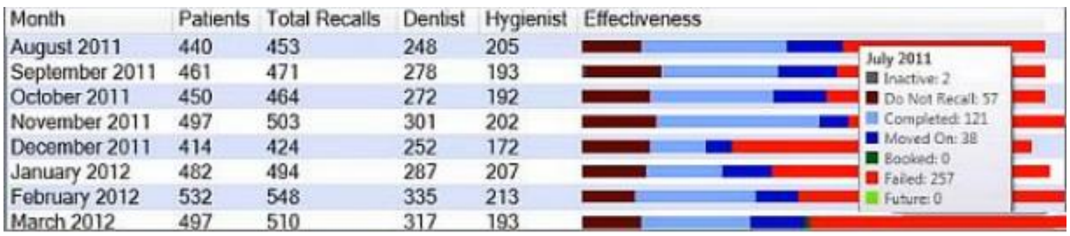
The Effectiveness graphic display has significant usage of colour, and you can mouse over any line to see a detailed tooltip breakdown of recall types. See Interpreting the Effectiveness display

Interpreting the colour display

Recall Manager provides automated, live, real time status information. The data in the graphical display is Live, so as you change recall dates in EXACT, it updates instantly, providing a visual snapshot of your recall effectiveness at any moment:

Because recalls are a critical element to the success of most dental practices, this display can be used as an instant snapshot of business health. Over time you can use it as a dynamic barometer to gauge the effectiveness of your recall policies.

For example, the predominance of red in this screen would be worrying:



Month	Patients	Total Recalls	Dentist	Hygienist	Effectiveness
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Roll over any graph area for tooltip Effectiveness statistics display:

Colour		Representing	Good or bad Indicator?
	Dark green	**Booked:** Patients with recalls whose appointments have been booked.	**Committed business** - this is the best recall status. The more dark green in the display, the better.
	Light green	**Future:** Patients with recalls in the future who do not have appointments.	**Still good.** Patients remain as likely revenue for the future.
	Light blue	**Completed:** Patients who completed treatment.	Indicates **work done**.
	Dark blue	**Moved On:** Patients with appointments that have been postponed.	**Okay.** "The appointment did not happen, but we haven't lost them yet; they are still in the system."
	Grey	**Inactive:** patients who are permanently lost to the Practice.	**Lost** - there will be no further business from these patients.
	Dark red	**Do not recall:** whether due to a patient decision or a Provider decision.	**Not lost just yet.** We will not recall them, but these patients may still choose to come back for further treatment.

	Red	**Failures:** Patients who failed to be recalled, with no further planned recalls or appointment bookings.	**"The life blood of the Practice draining away".** These patients were allowed to walk away. **NOTE:** The Recall Display should not show much red. If the Practice hasn't seen patients for a few years, or if they are otherwise lost to the Practice, they should either be de-activated (grey status), or the Practice should have a marketing drive to bring them back; they should not be left at "red" status.

If your appointment book is showing a lot of white space it would be helpful to look at patients that have failed their recall.

Old UDA/UOA Report

Shows UDAs/UOAs claimed and completed over time, grouped by the date of TC.

From the reports list select the performers required for the report, can use Multiple to select specific providers. (Leaving blank will print the report for all providers in the practice)

- The report is run per contract you have entered in Exact
- You can select to show detail which will give the patient name and the COT number.
- The report can be run to group daily, weekly or monthly.

Performer ZH

Date From	Days	Target	Claimed	Confirmed
01-04-14	30	141.51	0.00	0.00
01-05-14	31	113.21	0.00	0.00
01-06-14	30	113.21	0.00	0.00
01-07-14	31	141.51	0.00	0.00
01-08-14	31	113.21	0.00	0.00
01-09-14	30	141.51	0.00	0.00
01-10-14	31	113.21	0.00	0.00
01-11-14	30	113.21	0.00	0.00
01-12-14	31	141.51	0.00	0.00
01-01-15	31	113.21	0.00	0.00
01-02-15	28	113.21	0.00	0.00
01-03-15	31	141.51	0.00	0.00
Total for Performer ZH	365	1500.00	0.00	0.00
Total for contract 5664700001 (UDA) effective 01-04-2014 - 31-03-2015		14099.00	14.00	0.00

--End Of Report--

The report will show the date from which will be the first of the month if run monthly or every seven days from the first day the contract started. It will give the details of how many days are in that period.

The target column will show the providers target as of that period/date. Then the claimed column shows how many UDA's have been TC'd through Exact and the confirmed column shows how many UDA's were confirmed by the board.

Short Notice List

The Short Notice List allows you to collate a list of patients who would like to be notified of sooner appointments or of any opening slots if they have had to cancel. One a space appears you will be able to hover over the gap in the appointment book and click on the puzzle piece icon to alert patients on any appointment spaces that become available.

Enabling the Short Notice List

If the short notice list is not visible on the appointment book you may need to turn this on. In order to do this you will need to be logged in as an administrator or SUPER user.

1. Go to configure > practice settings
2. Add a tick in the 'Enable Short Notice List' box located at the bottom left hand side.

Adding the Short Notice List tab

After you have ensured the Short Notice List is enabled you may need to add it to your appointment book.

1. Click on the spanner at the bottom of the provider column window
2. Put a tick in 'Select tabs for your activity bar
3. Select 'Next >' twice
4. Select 'Short Notice List' in the 'Available Tabs' box then click on the >> to move it across into the 'Selected Tabs'
5. Click on 'Finish'

PLEASE NOTE: If you are an administrator you can add this for all users following the steps below:

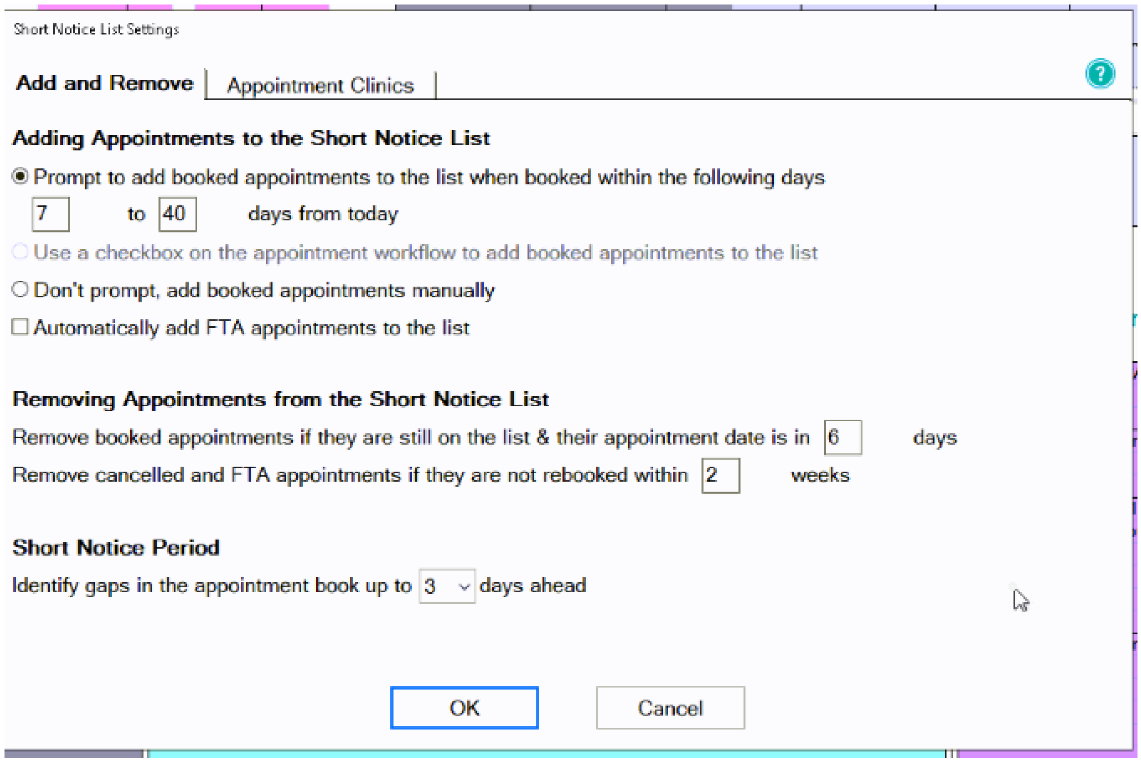
1. Click on Configure > User Settings
2. Click on the button and
3. Select the user from the list you would like to add the Short Notice List to and select OK.
4. Click on Setup next to 'Multi ApptBook Tabs'
5. Click Next
6. Select 'Short Notice List' in the 'Available Tabs' box then click on the >> to move it across into the 'Selected Tabs'
7. Click on 'Finish'

Configuring the Short Notice List

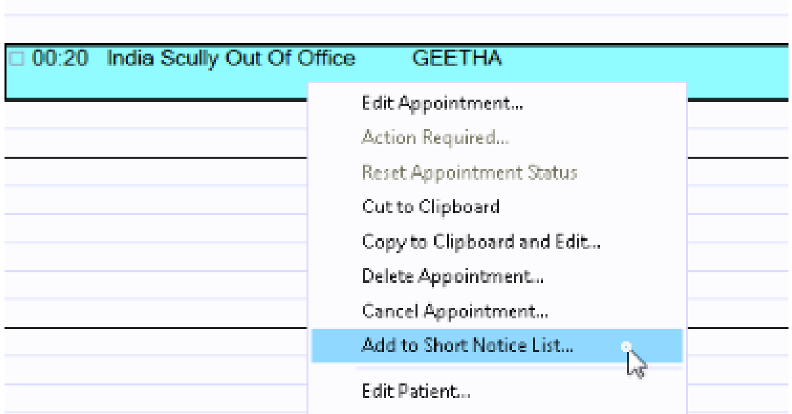
1. Go to the appointment book and go to the short notice tab, there should be a black spanner in the bottom right hand corner. You may need to be an administrator / SUPER user.

PLEASE NOTE: You can also access the Short Notice configuration by going to Configure > Practice settings and clicking on the spanner next to 'Enable Short Notice List'.

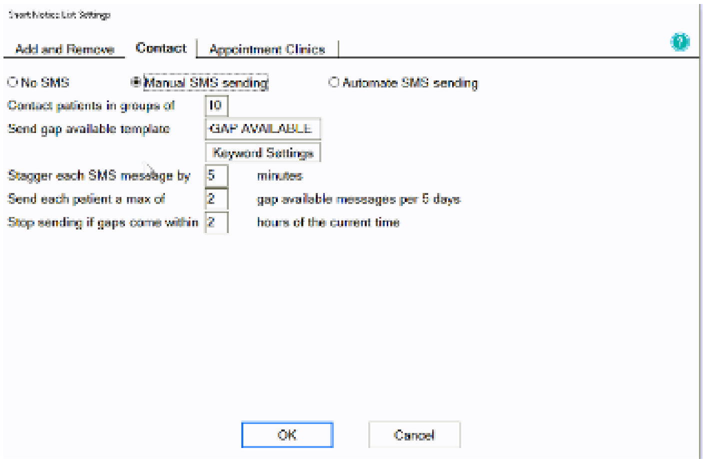
2. Opens on **'Short Notice List Settings'** window.



If you would like to be prompted to add appointments to the Short Notice List if booked within the specified date range (this is usually set to appointments between 7 to 40 days but can be amended for the practice's needs) OR use a checkbox OR don't prompt and add manually. You can add an appointment to the short notice list when cancelling or by right clicking on the appointment and selecting 'Add to Short Notice List'

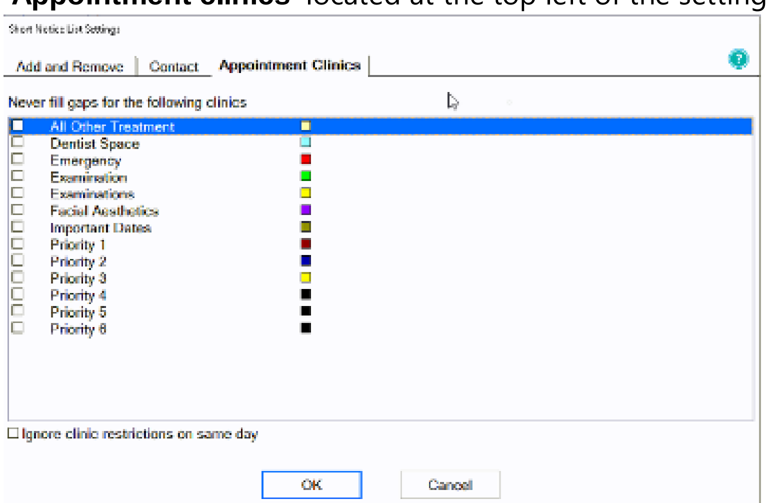


3. You can Tick/Untick box to add FTA appointments automatically.
4. You can also decide when to remove appointments from the Short Notice List by setting a time intervals in the two removal conditions shown above.
5. You will need to specify the short notice period itself. So the length of time from today it may find an appointment for- **Maximum 5 days**
6. '**Contact'** tab is located to the top middle of the setting screen.



a) From this section you can decide how patients are contacted. You can select 'No SMS' if you would like to call your patients to advise of short notice gaps, 'Manual SMS' if you'd like to decide which patients you will send an SMS to or 'Automate SMS sending' and the system will send text messages to all who fit the criteria of the available space. .
b) Then select the size of groups to contact which will limit the amount of patients on the short notice list that you contact about the space.
c) Select the template to send to patients – the default will ask the patient to reply by text message. If you do not have SMS replies you will need to amend this message.
d) Enter the time you would like to stagger messages by in minutes – this will allow a gap between sending the text messages to allow the patient to reply should they want it before the next person is contacted.
e) To prevent patients from feeling hassled can limit the maximum amount of gap messages a patient receives within 3 days.
f) Select timeframe to stop sending SMS if gap within '*x*' hours.

7. **'Appointment clinics'** located at the top left of the setting screen.



a) Select which clinics you would like to prevent gaps being filled

PATIENT COMMUNICATIONS

Presentation Manager

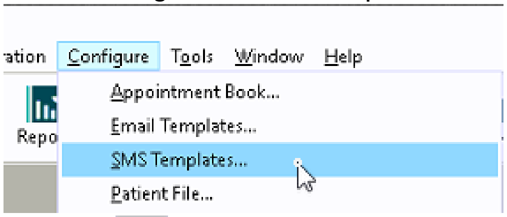
You can view a video guide using the link below:

https://www.youtube.com/watch?v=9hzBacO1VZo&t=7s

SMS

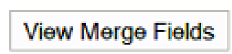
How to add SMS template

1. Go to Configure > SMS templates

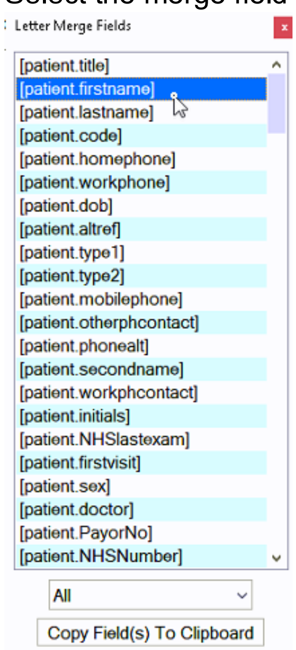


2. Click on 

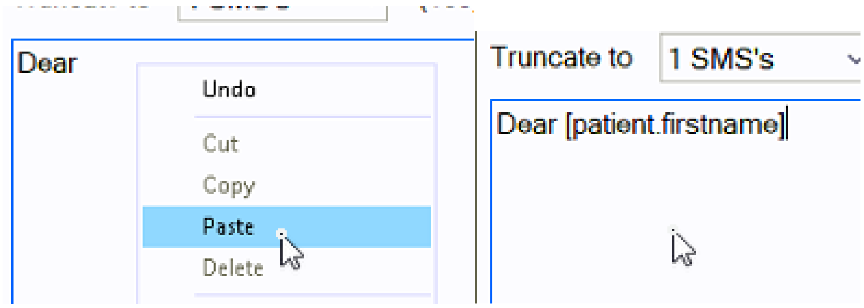
from the toolbar
3. Enter a code and a description. Please note: the code needs to be unique

4. Type your message into the available field.
5. To automatically pull information from the patient file click on 

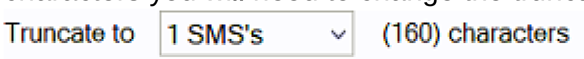
at the bottom left of the window and it will open the 'Letter Merge Fields' window
6. Select the merge field you need then click on 'Copy Field(s) to Clipboard'

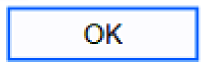


7. To paste the merge field into the body of your SMS right click in the space and select 'Paste'



8. A single SMS is 160 characters long – if the template you create is longer than 160 characters you will need to change the truncate option to as many texts as you need.

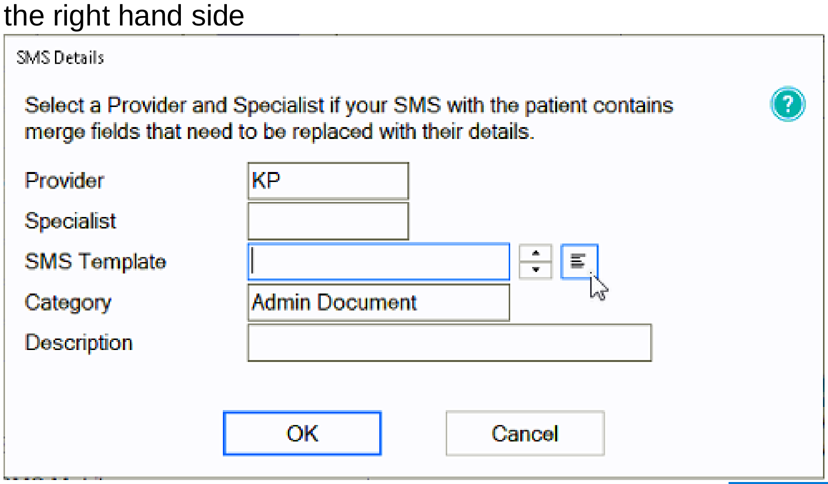


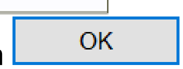
9. Once you have finished your template click 

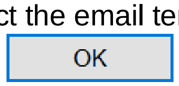
How to contact patients by SMS

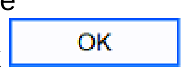
1. Go to the patients file that you wish to send an SMS to
2. Click on the 

button on the patients tool bar
If you would like to free type your SMS please go to step 5
3. On the screen below click into the SMS Template field and then click on the list button to the right hand side



4. Select the email template from the list and then click on 

5. Click 

6. You will be shown a preview of your SMS – if you have not used a template you will need to type your SMS here
7. Once you are finished click 

and the SMS will go to your patient. Any SMS sent will be stored in the 'Contacts' tab.

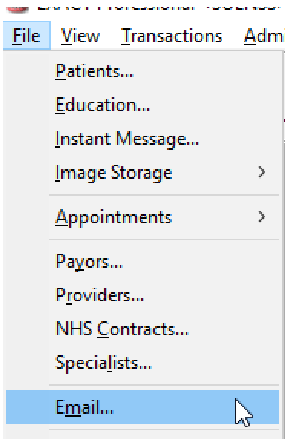
Email

Checking Inbox/Outbox

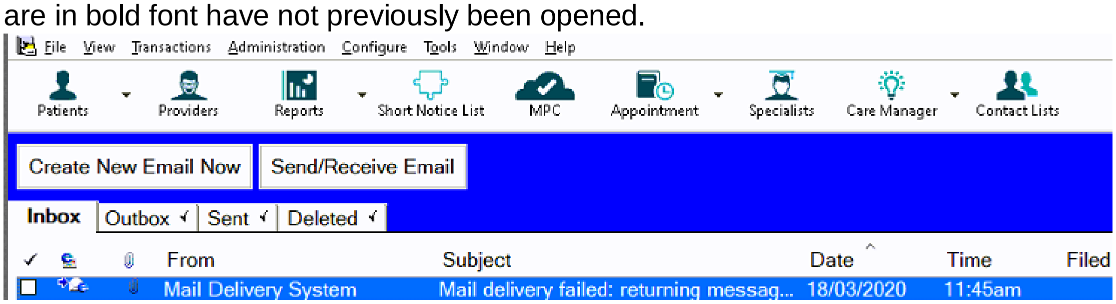
In order to check emails that patients have sent to you and make sure that your emails have left the outbox follow the steps below:

It is important to check your emails at least twice a day.

1. Go to File > Email



2. Once the screen opens you will see four tabs
   I. Inbox – This will include any emails that have been sent to you. Any emails that are in bold font have not previously been opened.



   II. Outbox – These are all the emails that are due to send but have not gone out yet (this may be because the email server is set to check itself every 10 minutes.

   You can override this by clicking on Send/Receive Email.
   III. Sent – This contains all of the emails you have sent from Exact
   IV. Deleted – This contains all of the emails which have been deleted from any of the other three folders.

Resetting Failed Messages

If any messages in your outbox show with the message **Failed to send** follow the steps below to resolve.

1. Click on the email that shows **Failed to send** so that it is highlighted.
2. Click on Reset Failed Messages on the bottom right hand side
3. The email should change to **Ready to send**

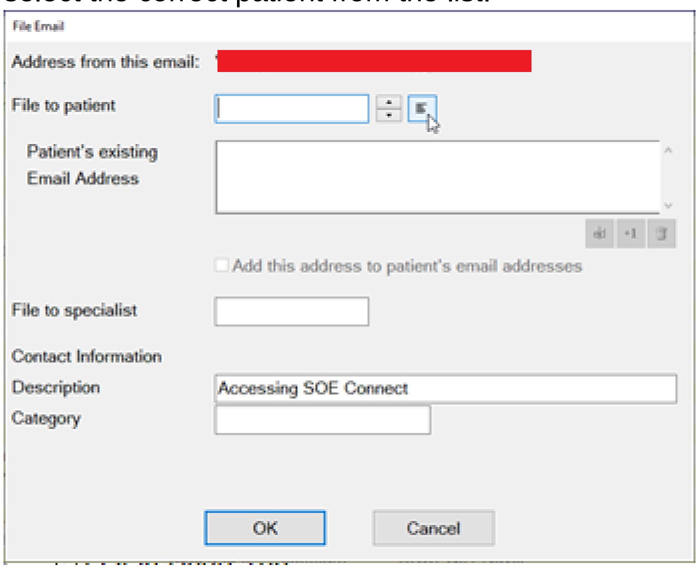
4. Click on Send/Receive Email and your email should now move to the sent tab.

Filing an email to a Patient

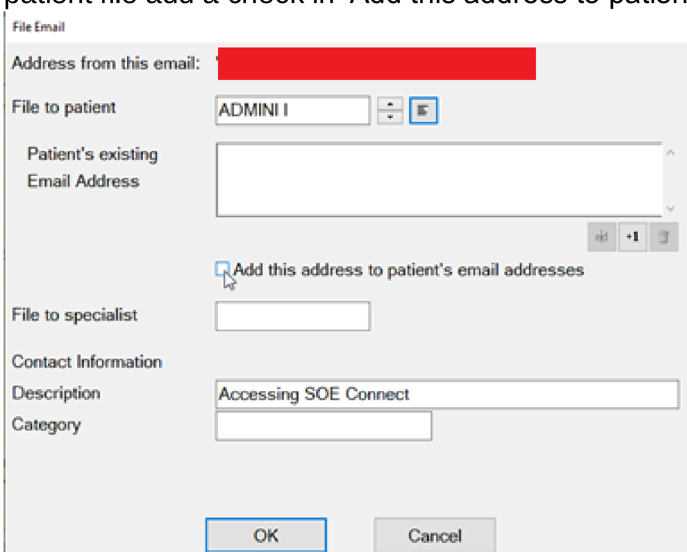
If you receive an email from a patient where their email is stored on their ‘Details’ tab it will automatically file to their ‘Contacts’ tab. If they have emailed you from another email address you will need to manually file this to their contacts tab, to do this please follow the steps below:

1. Go to the inbox
2. Click on the email that is not linked to a patient

3. Click on File
4. On the screen that appears click on the list button beside the ‘File to patient’ field and select the correct patient from the list.



5. Once you have selected the patient if you would like to add the email address to their patient file add a check in ‘Add this address to patient’s email addresses’



6. Once you are finished select OK and the email will now be stored on the selected patients contacts tab.

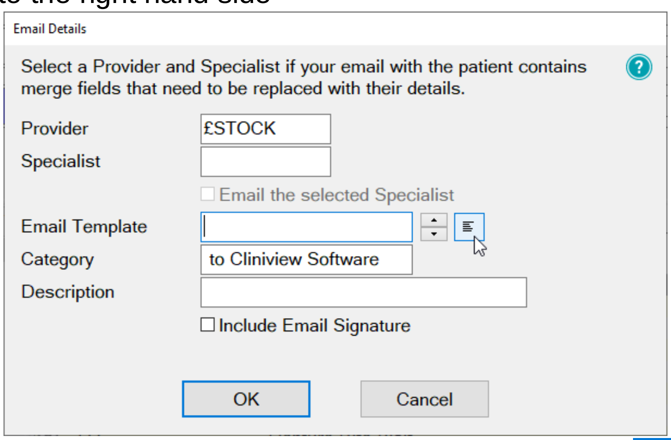
Please note: if you select 'Add this address to patient's email address' the email will be stored on the patients details tab as a sending email address.

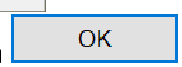
How to add email templates

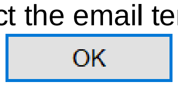
You can view a video guide using the link below:

https://www.youtube.com/watch?v=KgAX2dUrHU8

How to contact patients by email

1. Go to the patients file that you wish to email
2. Click on the  icon on the patients toolbar
    a. *If you would like to free type your email please go to step 5*
3. On the 'Email Details' screen click into the 'Email Template field and then click on the list button to the right hand side
    a. 

4. Select the email template from the list and then click on 

5. Click 

6. You will be shown a preview of your email – if you have not used a template you will need to type your email here.
7. Once you are finished click 

and the email will go to your patient. Any emails sent will be stored in the 'Contacts' tab.

HELPFUL INFORMATION

Who should I contact for help?

General EXACT Queries

Contact the SOEUK Support Desk on 01634 266 800

NHS Queries (PIN Numbers, List Numbers, Transmissions, Regulations)

Contact Practicioner Services on 01312 756 918

Software of Excellence YouTube Channel

Please use the link below to access the software of excellence YouTube channel for helpful how to videos.

https://www.youtube.com/user/soebestpractice/videos

Accessing the portal

Please use the link below to view a video guide to accessing the Software of Excellence Customer portal

https://www.youtube.com/watch?v=J4h5gNas5Uc

Statement of Dental Remuneration

Please use the link below to access the SDR

http://www.scottishdental.org/professionals/statement-of-dental-remuneration/

NHS Discretionary fee guide

Please use the link below to access the Discretionary fee guide

https://nhsnss.org/media/3148/discretionary_fee_guide_nov_2018_final_ver2.pdf